



## APPENDIX A

# PUBLIC PARTICIPATION

Advisory Committee Meeting  
Friday, September 17, 2004, 3:00 PM  
City of Atlanta Committee Meeting Room #1

**Attendees**

Bob Cain  
Ed Akins  
Elaine Falone  
Rob LeBeau  
Jia Li  
Flor Vlarde  
Michael Flemming  
Scott Levitan  
Scott Pendergrast  
Suzanne Bair  
Louis Merlin  
Liz Drake  
John Funny

**Proposed Stakeholder Interviews**

- GWCC
- Rev. Beckham
- GDOT
- CSX
- Norfolk Southern
- Bill Seay
- Georgia Tech – Les Saunders
- Ryan Gravel
- PATH Foundation
- Georgia Aquarium
- Atlanta Water Works
- Atlanta Housing Authority

**Proposed Additional Stakeholders**

- Steve Brock
- Mike Koblentz
- Image Film & Video
- Sandler Hudson Galleries
- Michael Phillips
- Westside Market Association
- Vulcan Materials
- Mead
- McPherson Petroleum
- Howard School

- Public schools – Centennial Place, King

### **Focus Groups**

- Focus groups will be open, and anyone can sign up for any topic.
- Certain stakeholders will be invited to focus groups that are on topics of their expertise/area of influence
- EDAW will solicit neighborhood participation if insufficient volunteers come forward

### **Suggested Meeting Locations**

#### Large Meetings

- The Contemporary
- Puritan Mill – 8,000 s.f. room; good for Final Open House
- Compound
- Antioch Baptist

#### Focus Group Meetings

- King Plow
- United Methodist Church
- MARTA – Brady St. facility
- Rev. Beckham's church

### **Publicity**

- Overall, a good job on the first meeting
- Contact strategy for first meeting included email, phone calls, distributed flyers, notices at NPU meetings, flyers to property owners
- Future strategy includes the above, but no additional flyers will be sent to property owners. Flyers will be included with NPU agendas
- Must confirm the location of the October 23 meeting by September 27

### **Kick Off Meeting**

- Multiple copies of maps desirable to allow many people to view
- Zoning should be supplemented with images of what could happen, i.e. big box retail
- Future strategy includes the above, but no additional flyers will be sent to property owners. Flyers will be included with NPU agendas.
- Some members of the advisory committee objected to the planned character image boards as lacking in substance. There was a discussion about whether the use of character image boards should be moved to other meetings, but the final decision was to keep them at the kick-off meeting. There was a general agreement that character image boards would be more helpful if they were targeted to specific areas. Also, many members of the advisory committee expressed an interest in a more diverse range of images for the character image boards.

- Improvements and additions to opportunities/constraints map and development map were discussed.

### **Study Issues**

- Displacement of existing residents
- City tax policy – why is industrial land assessed at a lower rate than residential?
- Create affordable spaces for artists to live and work
- Truck traffic
- Historic preservation. Which structures are most important to current residents and stakeholders? How can long-term preservation be achieved?
- Transportation alternatives, especially streetcar, beltline, etc.
- Speed of traffic on Marietta street on weekend nights
- Public space & green space
- Air quality. High amount of particulates in study area due to local industry.
- Use of publicly owned vacant facilities
- Large homeless population exists in study area. This must be considered with any proposals for the area, such as street furniture.
- Management and maintenance of city owned land
- Industrial facilities as possible terrorist targets. What is city policy?

# meeting summary

UPPER WESTSIDE LCI KICK OFF MEETING

THURSDAY, SEPTEMBER 23, 2004

THE VIEW AT KING PLOW

## 1 Introduction and Overview

- Welcome by Councilmember Felicia Moore. Councilmember Moore encouraged participants to stay involved throughout the study process.
- Welcome by Councilmember Ivory Young. Councilmember Young said that he would support the ideas and proposals coming from the community.

## 2 The Livable Centers Initiative

- Background to the LCI Program given by Ellen Heath, EDAW

## 3 Study Area Context and Existing Conditions

- Overview of Study Area Existing Conditions including transportation, land use, zoning, current development, opportunities and constraints, demographics, urban design, market conditions given by Liz Drake, EDAW.

## 4 Character Image Exercise

- All participants were given green dots and red dots to vote on preferred Character Images in nine categories. Green dots represented a favorable vote, red an unfavorable vote.
- Summary of Results
  - Industrial conversions that maintained the industrial character of the building were favored. Local examples scored more strongly than examples from other metros.
  - Pedestrian oriented and exclusively pedestrian spaces and plazas were strongly favored.
  - Mid-rise buildings, between 2-5 stories were favored.
  - Most Industrial development images scored poorly.
  - Most Institutional development images scored poorly.
  - The highest scoring image among all categories was the Streetcar, with 52 green dots and 0 red dots.

- Single Family Residential
  - Most Favored Image: Modern Live/Work, 3 Story
  - Least Favored Image: Ranch House
- Multi-Family Residential
  - Most Favored Image: Converted 2-Story Warehouse
  - Least Favored Image: Modern Concrete/Glass High-Rise
- Office
  - Most Favored Image: Modern Industrial Conversion (Puritan Mill)
  - Least Favored Image: Suburban Office Mid-Rise in Parking Lot
- Retail
  - Most Favored Image: Small City Main Street
  - Least Favored Image: Suburban Strip Center
- Industrial
  - Most Favored Image: Brick/Glass New Industrial w/Landscaping
  - Least Favored Image: Vehicle Parking w/Security Fence
- Transportation
  - Most Favored Image: Streetcar
  - Least Favored Image: Bus
- Open Space
  - Most Favored Image: Small Courtyard Plaza
  - Least Favored Image: Large Urban Plaza w/Building
- Activity Center
  - Most Favored Image: Pedestrian Only Courtyard
  - Least Favored Image: California Town Center
- Institutional
  - Most Favored Image: Industrial Conversion w/ Small Concrete Plaza
  - Least Favored Image: Modern/Contemporary Mid-Rise with Large Designed Plaza

## 5 Public Involvement Opportunities

- Public participation opportunities reviewed by Liz Drake, EDAW.
- Participants signed up for various Focus Groups

## 6 Questions and Comments

- Participant commented on importance of preventing involuntary displacement from existing neighborhoods.
- Participant commented on importance of attracting jobs to the area for existing residents.
- Participant asked if zoning would be changed by the 3-month planning process. A planner answered that the plan may contain recommendations for re-zoning, but the normal re-zoning process

would still have to occur to change the zoning of a property. Interested property owners are advised to stay active in the Upper Westside Study.

- A written comment was submitted to suggest that both sides of Donald Hollowell Parkway should be included in the study area, not just the north side. The study will consider both sides of Donald Hollowell Parkway.

## Kick Off Meeting Attendees

<b>Last</b>	<b>First</b>	<b>Display Name</b>	<b>Position</b>	<b>Organization</b>
Akins	Ed	Ed Akins		<b>Smith Dalia Architects, LLC</b>
Alexander	Manny	Manny Alexander	Property Owner	
Arpad	James	James Arpad		<b>Blandtown Neighborhood</b>
Bacon	Andrea	Andrea Bacon		<b>Gasket City Lofts</b>
Baker	Adam	Adam Baker		<b>Atlantic Station</b>
				<b>English Avenue Development</b>
Bates	Tracy	Tracy Bates		<b>Corporation</b>
Belgum	Kurt	Kurt Belgum		<b>HPICA</b>
Bennett	Dennis	Dennis Bennet	Property Owner	
Bowring	Jim	Jim Bowring		
Brearely	James	James Brearly	Developer	<b>Weaver &amp; Woodberry</b>
Campbell	Kelly	Kelly Campbell		
Carr	John	John & Jackie Cain		
Cheatam	Richard	Richard Cheatem		<b>HPICA</b>
Dawson	Alison	Alison Dawson		<b>Total Plant and Floral</b>
Dennis	Cindy	Cindy Dennis	Chair	<b>NPU D</b>
Dreher	Richard	Richard Dreher	City Council	<b>City Council District 3</b>
Dunkley	Bill	Bill Dunkley	Planner	<b>City of Atlanta</b>
Dwyer	Anthony	Anthony Dwyer		
				<b>Howell Station Neighborhood</b>
Falone	Elaine	Elaine Falone	Vice President	<b>Assn.</b>
Favors	Irwin	Mr. & Mrs Irwin Favors	Property Owner	
Flaherty	Curt	Curt Flaherty		<b>Marietta St. Artery</b>
Flemming	Michael	Michael Flemming	Planner	<b>City of Atlanta</b>
Floyd	Kell	Kell Floyd		
Foster	Steve			<b>Georgia Power</b>
Frair	Steve		Property Owner	
Franklin	Sarah	Sarah Franklin	Property Owner	
Gammage	Henry	Henry Gammage		<b>Gammage &amp; Co Marketing</b>
Goswick	Camille	Camille Goswick		<b>The Story</b>
Gould	Bill	Bill Gould		<b>Marietta St. Artery</b>
Gravel	Ryan	Ryan Gravel		<b>Friends of the Belt Line</b>
Green	Shaun	Shaun Green	President	<b>Home Park</b>
Greenwood	Robert	Robert Greenwood		<b>Julian LeCraw</b>
Grose	Matthew	Matthew Grose		<b>Brock Built</b>
Hawthorne	Greg	Greg Hawthorne		<b>Vine City Housing Authority</b>
Hearn	Gil	Gil Hearn		<b>Winter Properties</b>
				<b>Howell Station Neighborhood</b>
Hobbs	Comer	Comer Hobbs	President	<b>Association</b>
Hodgins	Jim	Jim Hodgins		
Innes	Pamela	Pamela Innes		
Johnson	Ron	Rob Johnson		<b>Castleberry Meats</b>
Jones	Bob	Bob Jones		<b>Be Thursday Development Corp.</b>
Lawson	Rose	Rose Lawson	Property Owner	
Leonard	Jonathan	Jonathan Leonard		
Linder	Stacie	Stacie Linder		<b>Gasket</b>
Massey	D	D Massey		
Meinhardt	Carl	Carl Meinhardt		<b>Winter Properties</b>
Morrison	Trey			<b>Howell Station</b>



## Kick Off Meeting Attendees

Last	First	Display Name	Position	Organization
Mundy	June	June Mundy		
Murphy	Clinton	Clinton Murphy		
Peel	William	William Peel		
Reagan	John	John Reagan	President	<b>Urban Realty Partners</b>
Riley	Jerry	Jerry Riley		<b>NPU K</b>
Rosenberg	Robin	Robin Rosenberg		<b>RYR Properties</b>
Ruffin	Christian	Christian Riffin		<b>The View</b>
Seay	Bill	Bill Seay		<b>HPCIA</b>
Silverman	Bob	Bob Silverman	President	<b>Winter Properties</b>
Smith	Bill	Bill Smith		<b>West 14th Building</b>
Smith	Margo	Margo Smith		
Smulian	Rob	Rob Smulian		<b>Atlanta Contemporary Art Center</b>
Stinson	Tina	Tina Stinson	Property Owner	
Svedrerg	Rob	Rob Svedrerg		<b>Hastings Seed</b>
Tadesse	Sammy	Sammy Tadesse		
Thomas	Drewnell	Drewnell Thomas		<b>NPU K</b>
Thompson	Micah	Micah Thompson		
Tiller	Michael	Michael Tiller	Property Owner	
Tyl	Nicole	Nicole Tyl		<b>NPU J</b>
Vanderkley	Harold	Harold Vanderkley		<b>Vanderkley &amp; Associates</b>
Vanderkley	Mark	Nexus Pulp & Paper		<b>Vanderkley &amp; Associates</b>
Vlarde	Flor	Flor Vlarde	Planner	<b>City of Atlanta</b>
Waldron	Nikki			<b>Howell Station</b>
West	Michael	Michael West		<b>West View</b>
White	Max	Max White		<b>Avantis</b>
Wismar	Peter	Peter von Wismar		

# Character Image Response

## Single Family Residential

	Green	Red	% Green	% Red	Total
Modern Live/Work	27	1	96%	4%	28
Charleston Style	25	1	96%	4%	26
Modern European Alley	24	2	92%	8%	26
TND Traditional Homes	15	18	45%	55%	33
Large California Modern Hybrid	12	3	80%	20%	15
Ranch House	1	14	7%	93%	15
<b>Total</b>	104	39	73%	27%	143

## Multi-Family Residential

	Green	Red	% Green	% Red	Total
Converted Warehouse Midrise	38	0	100%	0%	38
Brick Warehouse Townhomes	33	1	97%	3%	34
Modern Live/Work Townhomes	20	2	91%	9%	22
Modern Midrise	16	3	84%	16%	19
Hybrid Brick/Siding Midrise	13	26	33%	67%	39
Modern Glass/Concrete Highrise	6	16	27%	73%	22
<b>Total</b>	126	48	72%	28%	174

## Office

	Green	Red	% Green	% Red	Total
Modern Industrial Conversion (Local)	40	0	100%	0%	40
Modern Industrial Conversion	29	1	97%	3%	30
Modern Industrial Conversion (Watertower)	21	4	84%	16%	25
Modern Urban Office Building w/Plaza	1	17	6%	94%	18
Suburban Office Park	1	17	6%	94%	18
Suburban Office Midrise	0	22	0%	100%	22
<b>Total</b>	92	61	60%	40%	153

## Retail

	Green	Red	% Green	% Red	Total
Small City Main Street	40	0	100%	0%	40
Outdoor Retail/Farmer Market	37	0	100%	0%	37
Urban Streetfront Retail Conversion	35	1	97%	3%	36
Neighborhood Retail - Horizontal MU	31	9	78%	23%	40
Destination Retail - Converted Warehouse	7	15	32%	68%	22
Suburban Strip Center	1	40	2%	98%	41
<b>Total</b>	151	65	70%	30%	216

### Industrial

	Green	Red	% Green	% Red	Total
Brick/Glass New Industrial w/ Landscape	10	4	71%	29%	14
Brick/Glass New Industrial w/ Grass	2	15	12%	88%	17
Industrial Park	0	18	0%	100%	18
Heavy Industrial	2	26	7%	93%	28
Metal Sheds	0	26	0%	100%	26
Parking	0	34	0%	100%	34
<b>Total</b>	14	123	10%	90%	137

### Transportation

	Green	Red	% Green	% Red	Total
Streetcar	52	0	100%	0%	52
Bike Path	38	2	95%	5%	40
Narrow European Street w/ Rail	30	1	97%	3%	31
MARTA Heavy Rail	15	1	94%	6%	16
Divided Boulevard w/Bike Lanes	5	28	15%	85%	33
Bus	2	16	11%	89%	18
<b>Total</b>	142	48	75%	25%	190

### Open/Green Space

	Green	Red	% Green	% Red	Total
Small Courtyard Plaza	35	0	100%	0%	35
Small Urban Plaza by Street	33	0	100%	0%	33
Nature Preserve	31	3	91%	9%	34
Greenway w/ Bench	28	2	93%	7%	30
Ballfield	16	2	89%	11%	18
Large Urban Plaza w/Building	3	11	21%	79%	14
<b>Total</b>	146	18	89%	11%	164

### Activity Center

	Green	Red	% Green	% Red	Total
Pedestrian Only Courtyard	32	1	97%	3%	33
Historic Main Street	27	0	100%	0%	27
New Urbanist Town Center	14	8	64%	36%	22
Soft/Hard Plaza around Midrises	11	1	92%	8%	12
Large Landscaped Urban Plaza	8	2	80%	20%	10
California Town Center	8	5	62%	38%	13
<b>Total</b>	100	17	85%	15%	117

### Institutional

	Green	Red	% Green	% Red	Total
Industrial Conversion w/ small concrete plaza	31	0	100%	0%	31
Low Curvilinear w/Large Plaza	7	4	64%	36%	11
Industrial Modern w/o Landscape	4	9	31%	69%	13
3-Story Contemporary-Historic w/ Courtyard	2	13	13%	87%	15
Modern Midrise with hard/soft landscaping & benches	2	12	14%	86%	14
Modern/Contemporary Midrise with Large designed plaza	1	13	7%	93%	14
<b>Total</b>	47	51	48%	52%	98

Upper Westside LCI  
Non-Profit Focus Group Summary  
October 4, 2004

**Attendees**

Trey Morrison  
Byron D. Amos  
Liz Drake, EDAW  
Louis Merlin, EDAW  
Jia Li, City of Atlanta

**Strengths**

- Diversity
- Potential
- Forward thinking
- Funky, creative, fresh
- Good access to regional destinations
- The Story – neighborhood paper
- Northwest Community Alliance – Koblenz
- Antioch Master Plan

**Weaknesses**

- Difficult to navigate
- Neighborhood isolated
- Lack of community facilities
- Social networks limited
- Could be pigeonholed, dominated by a single type of development
- Howell Station too far from other neighborhoods
- Lack of neighborhood retail
- Abandoned properties – absentee landlords

**Successful Plan**

- Need a quick, visible win
- Create a livable center – housing, infrastructure, community facilities
- Increase and diversify organizational capacity and dialogue among diverse groups
- Capture the energy
- Real connections in the area
- Welcome minorities of all types
- Organizations should act as a “stackpole” – music, thought, art, action

**Social Service Needs**

- Increased opportunities for expression, communication, and interaction
- Loss of industrial jobs
- Deconcentration of poverty in English Avenue/Vine City

### **Issues**

- Lack of community buildings and active recreation
- Rising property taxes & displacement
- Deal with post-modern urban dwellers
- NPUs sometimes conflict with neighborhoods
- NPUs always deal with land conflict, so lack of vision
- Displacement – rental displacement, housing is renovated, then rents rise
- English Avenue has ample opportunity for single family infill housing
- Hidden Gem – English Avenue School
- Hidden Gem – Properties across from King Plow
- Need for more senior housing to match changing demographics
- Low level of home ownership in English Ave.
- Vine City is the Final Frontier for redevelopment, positive change
- Greenspace proposed in Vine City flooding area.

### **Existing Social Service Facilities**

- New Horizon Senior Service Center

Upper Westside LCI  
Neighborhood Focus Group Summary  
October 5, 2004

**Attendees**

Henry Gammage  
Bill Gould  
Bob Cain  
Curt Flaherty  
Ed Akins  
Elaine Falone  
Suzanne Bair  
Liz Drake, EDAW  
Louis Merlin, EDAW  
Jia Li, City of Atlanta

**Land Use Conflict**

- English Avenue/Bankhead – Junkyards create incompatibilities
- Areas that are cleared but remain unimproved for a long time
- Large scale/institutional development near Herndon Homes; these properties fail to address the neighborhoods
- Large amount of impervious surface increases flooding risk, particularly for Viner City
- Institutions need a scale and character that embraces adjacent neighborhoods -> more mixed use
- Large volume of truck traffic around Better Brands
- Junkyard at Marietta & Tilden by Knight Park
- re-zone the commercial frontage of the neighborhood on W. Marietta Street to an appropriate mixed-use, etc.
- ensure that all zoning will not be able to use older maps to improperly subdivide lots into small lots that do not coincide with existing lots
- Type and scale of fencing needs to adapt to residential.
- Brownfield – 14th & Howell Mill Gas Station

**Neighborhood Retail**

- Antioch Church is focal point of English Ave.
- Bankhead is a natural neighborhood center and commercial corridor
- Marietta is a natural corridor for gathering of various neighborhoods
- Farmers market in parking lot or unused warehouse
- Huff as natural retail corridor

**Greenspace**

- Expanded Surrender of Atlanta site

- Possible 900 acre site west of Marietta Blvd near quarry
- Reclaimed quarry
- West of Marietta Blvd.
- Rail stubs
- Quarry
- Residual spaces

### **Single Family Housing Locations**

- Infill single family opportunity in English Ave
- Restore single family in Blandtown
- Need a traffic light along Huff Road.
- Steve Brock owns much of land in this area
- Preserve heritage/name of Blandtown area

### **Multifamily Housing Locations**

- A number of adaptive re-use opportunities identified

### **Pedestrian Streets/Connections**

- Donald Hollowell – road needs to be straightened. Cannot walk under bridge to Maddox Park
- Marietta St. – need for lighting, trash cans, improved MARTA stops, sidewalks

### **Transportation**

- Trolley link to King Plow, GWCC
- Trolley route – Howell Mill, Atlantic Station, Northside
- instill a transportation link to the Beltline (or whatever surfaces)

### **Other Issues**

- Gentrification/Displacement
- Subdivision of existing lots based on old plats.
- Desire for better buffering around industrial uses – trees and landscaping; appropriate fencing
- Preserve heritage of Blandtown
- Brownfield assistance available from city
- Concern over impact of re-development on Blandtown
- Alta West as a good example of appropriate scale and style for multifamily
- Several areas of still viable industry were identified
- Better Brands may be leaving. Is this a development opportunity?

Upper Westside LCI  
Greenspace Focus Group Summary  
October 11, 2004

**Attendees**

Bill Gould  
Myott  
Trey Morrison  
Elaine Falone  
Matthew Grose  
Henry Gammage  
Liz Drake, EDAW  
Louis Merlin, EDAW  
Jia Li, City of Atlanta

**Existing Parks**

- Knight Park
  - Erosion an issue
  - Community center
  - Playground
  - Basketball court
- Maddox Park
  - More programming desired
  - Some people feel unsafe in this park
- Atlantic Station dog park
- M-West 4 acres of forest – where?
- Atlanta Water Works park east of Water Works

**Proposed Parks**

- Beltline
- Federal Consent Decree Greenspace around Proctor creek, west of Marietta Blvd

**Possible New Parks**

- Former English Ave School & Boys & Girls club on Hollowell
- South of Jefferson st. between Griffin & Echo – largely overgrown lots & some industrial
- South of Kennesaw and west of Marietta Blvd
- Surrender of Atlanta site at Northside & Marietta
- Plaza at Lowry & Marietta, on existing Mead parking
- Possible Beltline stop/side park north of Culpepper along railroad line
- Pull Atlanta Water Works fence closer to water, allow use of land
- North of 11th Street and east of Howell Mill



- Triangle plaza at Huff Road & Earnes St.
- Plaza north of 8th St. and east of Brady
- Possible plaza near Hands on Atlanta & abandoned Bankhead bridge?
- Possible Atlanta Railroad Museum in CSX triangle, connecting various segments of study area.

### **Open Space Types**

- Desire for large nature preserve.
- Desire for many small urban plazas and pocket parks, close to residences & businesses

### **Linear Greenways**

- Abandoned rail line parallel to Jefferson, down to GWCC
- Desire for Huff Road linear connection or parallel connection such as Culpepper or power line ROW
- Possible greenway along Marietta Blvd? Connect

### **Other**

- Georgia Power has private greenspace on Lowry

Upper Westside LCI  
Development Focus Group Summary  
October 12, 2004

**Attendees**

Bill Smith  
Henry Gammage  
William Peel  
Jack Wexler  
Carl Meinhardt  
Bill Seay  
Matthew Grose  
James Arpad  
Eleanor Matthews, Marketek  
Ray Strychalski, EDAW  
Louis Merlin, EDAW  
Jia Li, City of Atlanta

**Zoning & Regulation**

- SPI zoning adds another layer of bureaucracy to approval process
- Developers & property owners should have more freedom in developing their properties
- Regulation hampers creativeness
- Promote regulatory flexibility

**Transportation**

- Need for east-west travel
- Desire for walkable areas, though the whole area is not likely walkable
- Need to make Howell Mill 4 lanes throughout
- Need to connect Howell Mill & Bishop
- Expand Bishop to 4 lanes. 17th St. runs into Bishop & will be a bottleneck.
- Focus on crossing railroad corridors

**Desired Development**

- Oil is becoming more expensive
- Live-work trend increasing
- Make Marietta Street more humane.
- Define corridors & common areas
- Create a series of nodes along corridors
- Increase connectivity of streets
- Keep diverse character of the area
- Possible to have diversity in a compact area because of borders & barriers
- Density will create walkability

- LEED standards should be promoted

### **Market & Trends**

- Young couples, single women, young professionals
- Good schools in study area – Centennial Place, Inman School, Grady High
- Atlantic Station a major influence
- Need for neighborhood retail, though destination retail is ample
- Existing retail strong in home furnishing & décor
- Growing entertainment destination
- Too many clubs could be bad for residential
- Art galleries, theatres, restaurants appropriate
- Still a good place to pick up a large building near the city

### **Districts**

- Warehouse/Mixed Use district
- Knight Park residential
- Destination retail district – Huff + Ellsworth
- Marietta St. Corridor
- Jefferson Industrial Triangle
- Lowry Mixed Use Corridor

### **Other**

- Bethesda planning a major development along Northside Drive. Kroger.
- Developers will build sidewalks, so spend LCI dollars on improving connections
- Weaver & Woodberry building 75 condos is Home Park Warehouse District
- Nearby Walmart at old Castelberry site
- Georgia Tech developments on Marietta St, North Ave.

Upper Westside LCI  
Private Property Focus Group Summary  
October 13, 2004

**Attendees**

Henry Gammage  
Bill Smith  
Maria Mollise  
Rob Svedberg  
Bob Cain  
Max White  
James Arpad  
Ed Akins  
Scott Levitan  
William Peel  
Eleanor Matthews, Marketek  
Louis Merlin, EDAW  
Jia Li, City of Atlanta

**Vision**

- Live work – small industry, retail, private office, residence in same building
- Some manufacturing
- Not homogeneous, concern about gentrification
- Maintain affordable housing
- Old single family residential communities – north of eleventh street, east of Lowry
- Post industrial – smaller scale industry, family owned, country feel, small storefronts
- Mixed use
- Density
- Some industry
- Increase livability
- International city

**Development Trends & Opportunities**

- Housing prices have doubled-tripled in past 10 years
- Prices around \$1,000,000/acre
- Land price too high for single family housing
- Single family housing infill opportunities in English Avenue
- Long term trend is towards abandonment of industry
- Student condos
- 2nd homeowners
- Better Brands may be moving. Underused telecom warehouse. Possible ethnic grocery, grocery delivery, Zifty.

- Why is Northyards not leasing? Too far from the action?
- Georgia Tech – creating secondary incubators ~ 130,000 s.f.. Commercial laboratory buildings. Average used will be ~ 10,000 s.f. of space.
- Georgia Tech – North Avenue Research Area – ‘dirty research’. High voltage transmission lines?
- Georgia Tech – Academic campus will move to Marietta St. Opportunity for new, wider right of way with amenities.

## **Policy**

- Incentives for adaptive reuse
- Allow live-work
- Level the playing field for small developers, small developments
- Industrial Zoning (I-2) permits everything, adult entertainment
- Allow neighborhood to have strong control over liquor license
- Encourage small industry to remain in neighborhood. Zoning categories that permit some industry.
- Encourage Mead to have activity at street at Marietta & Lowry

## **Entertainment**

- Want some entertainment, but not too much
- Nuisance problem with noise, traffic, etc.
- Where should it go? Concentrate in one area, or distribute throughout?
- Need city to enforce ordinances on noise, trash, etc.
- Some types more desirable than others – nightclub vs. pub, performing arts vs. stripclub, Compound vs. Northside Tavern
- Shorter hours, smaller size, beer vs. liquor
- Once a liquor license is given, it is easier to transfer than get a new one?
- Maint

## **Districts**

- Blandtown – mixed use
- Lowry – mixed use corridor

## **Catalyst Sites & Actions**

- Greenway along CSX right of way, connecting to Bethursday development
- DLH & Northside is a key node for catalyzing development

## **Sparkplugs**

- Threat of homogenization, national retailers invading
- Marietta Street Artery
- Home Park
- Atlantic Station
- Furniture + design

- Aquarium
- Georgia World Congress Center
- Beltline

Upper Westside LCI  
Transportation Focus Group Summary  
October 19, 2004

**Attendees**

Erica Shuler  
Jamie Hutchinson  
Chris Morrell  
Joel Harrell  
Carl Meinhardt  
Henry Gammage  
William Peel  
Bob Cain  
Shaun Green  
Richard Cheatham  
Bill Gould  
John Funny, GRICE  
Clovia Hamilton, GRICE  
Liz Drake, EDAW  
Jia Li, City of Atlanta

**Safety is a concern - esp. at 7 intersections**

- Marietta Blvd at Marietta St
- Marietta St at Joseph Lowery (formerly Ashby St)
- Northside Dr at 14th St
- Northside Dr at 10th St
- Northside Dr at Marietta St
- Donald Lee Hollowell (formerly Bankhead Ave) at Joseph Lowery
- Northside Drive at Don Hollowell

**Connectivity is a concern**

- Need ADA compliant sidewalks - start with the major streets
- Need signage and streetscaping to create a sense of community-
- Start with the main arteries - "this would be monumental" to improve the area and the sense of pride will likely permeate into the neighborhoods.
  - Northside
  - Howell Mill
  - Donald Lee Hollowell
  - Huff
  - 14th
  - 10th
- Need rail grade separation where connectivity requires crossing tracks
- Create connections to major activity centers such as Atlantic
- Station and Centennial Olympic Park/ Aquarium with a trolley system

- Need bus schedules on signs and bus shelters and sidewalks at bus stops
- Try to use rail ROW for bike paths

### **Other Issues**

- A West Marietta Street light industrial manufacturing business owner requested the continuation of the 17th Street improvement project west into the study area
- Need to clearly identify the rail and trucking industrial land
- Uses and buffer the residential areas from these land uses
- Stop sign at Foster and Huff
- Traffic light at Bishop and Howell Mill
- Need a middle turn lane along Northside Drive - esp at Ethel, 8th and 11th



Advisory Committee Meeting #2  
Monday, October 18, 2004, 6:30 PM  
City of Atlanta Committee Meeting Room #1

### **Attendees**

Bob Cain  
Ed Akins  
Jia Li  
Flor Velarde  
Doug Young  
Scott Pendergrast  
Bob Jones  
Louis Merlin  
Liz Drake  
John Funny

### **Historic Preservation**

Doug Young of the UDC review two types of districts:

- federal

does not regulate, but can grant tax breaks or property tax assessment freezes for improvements up to 50%

- local

requires review by the UDC

three types of local review in order of stringency of protection:

- landmark
- historic district
- conservation district

required elements for historic designation:

- signatures of property owners (not all required)
- photographic survey
- proposed boundary
- proposed regulations

historic preservation is essentially an overlay onto the zoning district

nomination is done on a neighborhood-by-neighborhood basis

fact sheets and background are available from the UDC

façade easements are also available in Atlanta

strong candidates for local historic preservation in the study area include:

- Murray's Mill
- Interlocking Historic District
- Properties along Marietta Street
- Means Street
- City waterworks property
- White Provision Building
- District around Bacchanalia

The study area is likelier to have individual candidates available for preservation than whole districts because of loss of historic integrity

The relevance of the area is that it gives a snapshot in time of neighborhood development from the 10s and 20s which combined rail, housing and industry

### **Other Issues**

Make sure to include information from Mike Dobbins' class at GT

Modify LCI goals slightly to include reflect a desire for adequate transportation performance and function.

Add rail lines to base map and indicate if they are active or under used

Include additional symbols for use on the base map: urban plaza (separate from parks) pedestrian crossing, new streets, transit stop, visual anchor (can combine several features like public art, gateway, key building)

Many stakeholders do not want homogeneity in the study area – it is suggested that charette participants be asked to divide the study area into smaller districts and then write a vision statement for each district so that we have some diversity of themes.

Participants should also be asked to draw land use and other area-wide features like greenways and transit/street networks on the map first before putting on the symbols.

Give instructions to each table with a suggestion of the amount of time spent on each task.

Include photos of what each symbol represents.

Stakeholder interview list is confirmed with the following changes:

- Invite NPU chairs to a single meeting
- Add Ryan Gravel of Friends of the Beltline
- Add Ed McBrayer of PATH

### **Remaining Items**

Bob Jones will confirm the availability of the Fellowship Hall at Antioch Church for the draft presentation on November 11.

# meeting summary

UPPER WESTSIDE LCI CHARRETTE

SATURDAY, OCTOBER 23 2004

HANDS ON ATLANTA, 600 MEANS ST. SUITE 100

## 1 **Welcome and Introduction**

Jia Li from the City of Atlanta welcomed stakeholders to the charrette and introduced City of Atlanta and EDAW staff.

## 2 **Presentation on Findings to Date**

Liz Drake gave a slide presentation summarizing findings to date (This document is available through the City of Atlanta website). She reviewed the goals of the LCI program and discussed how they might be adapted to the Upper Westside study area. The results of the Character Image Survey were reviewed. Liz explained the main results of the Focus Groups, which were completed prior to the Charrette. The market potential of the study area was addressed. Liz then explained the upcoming planning exercises. She closed with information about how to stay abreast of the study and future public meeting events.

## 3 **Breakout Work Sessions**

All public participants were divided into three groups, each group guided by two or more planners. These groups went through a series of exercises to create a vision and recommendations for the Upper Westside.

The first exercise was to review the standard list of LCI goals and to revise these goals to suit the Upper Westside. Stakeholders were also able to propose new goals.

The second exercise was to divide the study area into districts, and to write a character statement for each district. These districts could represent different land uses, architectural character, or natural separations of the study area. The goal of this exercise was to acknowledge the diversity of the study area and to promote its continued diversity.

Next stakeholders created a future land use map, by coloring in the districts with the dominant land uses they would like to see in the future for each

district. Future land use was indicated with different colors for industrial, residential, retail, open space, mixed use, and office/institutional.

The next exercise addressed the defining features that unite or provide a focus for the entire study area. These features include new streets, transit corridors, greenways, bike lanes, streetscapes, and activity nodes. Participants drew these features directly onto a base map, while referring to their earlier work on districts and land uses.

The last exercise of the charrette was to add symbols for specific land uses, for specific open space locations, for transit stops, and for landmarks/gateways to the study area. Each of these features was indicated with a small symbol on a square of paper. These features were then glued to the base map to indicate their desired locations.

#### **4 Presentation of Group Ideas**

Each group nominated two community participants to explain their ideas to the rest of the audience. These participants used the districts/land use map, and the big features/small features map to explain the main ideas and proposals of their group.

#### **GROUP #1 SUMMARY**

##### Goals

- Coordinate land use with transportation
- Improve efficiency and safety of transportation, with a special focus on the pedestrian
- Keep the character of the area unique, diverse, and distinctive
- Assure transportation investments reflect community and existing business needs
- Improve the connectivity and connect various nodes
- Avoid displacement of existing residents, businesses, and social service agencies
- Bring arts into the area
- Promote open space
- Recognize the importance of social service agencies and integrate them into the community in the best way possible

##### Districts

- The future of all of these districts is in mixed use.
- Downtown lifestyle district in southeast corner. Promote residential integrity amidst the activity of downtown.
- Antioch district in southwest corner. A residential-institutional-mixed use neighborhood.
- Main street/Marietta Street. A pedestrian friendly arts district with a concentration of uses and activity.

- English Avenue North – a neighborhood revitalization district that complements the existing English Avenue neighborhood and provides more services for that neighborhood.
- King Plow Industrial Warehouse – an industrial adaptive reuse district that promotes existing industrial uses and acts as an employment magnet.
- Huff Road Design District.

### Features

- Transit corridors along the Beltline, along Hollowell to the Bankhead MARTA, and along Marietta Street from downtown and down Marietta Boulevard.
- Greenways along the unused rail line by Bedford Street, connecting to Maddox Park, along Marietta Boulevard connecting to the Proctor Creek open space area, and a greenway parallel to Marietta Boulevard through existing forests and connecting to a residential area near current Blandtown.
- Pedestrian streets concentrated along the Main Street area, including Northside, Marietta St, and Brady running north-south and Eighth, Tenth, and Fourteenth running east-west. Pedestrian streetscapes along Joseph Lowery, Donald Hollowell, the full length of Marietta St. and Huff Road, also connecting to Elaine and parts of Ellsworth Industrial.
- Bikeways along Marietta Boulevard and Marietta Street.
- Activity Nodes at Elaine and Marietta Blvd, at Lowery and Marietta St., and a Main Street along Marietta/Howell Mill.
- Landmarks at Marietta Blvd and Hollowell, at Hollowell and Northside Drive, at Marietta and Northside, at Howell Mill and the Water Works, and at Fourteenth St. and Northside.
- Improved street grid in the Main Street area with a new north-south street between Howell Mill and Northside. An extension of Huff Road to Northside Drive and a park along the waterworks. An extension of Culpepper Street to Ellsworth Industrial. A extension of Culpepper Street to Ellsworth Industrial. A new connection between Fairmont and Huber Street.

## **GROUP #2 SUMMARY**

### Goals

- Preserve existing business and communities activities, but help guide them to integrate with the community
- Promote public transit and create multi-modal connections and new transportation options.
- Establish a regular system of transit stops to make public transit more convenient than auto.
- Improve land use compatibility by zoning out non-compatible uses
- Create a visual branding for distinct districts
- Acknowledge and support the needs of existing industrial uses to enhance their success as the district develops

### Districts

- Industrial Economic Employment Center - The central area near Lowery and the west side of Marietta. This area seeks to preserve industry and existing employment.
- Westside Center – The key corridors of Marietta St. and Howell Mill as a true live-work-play mixed use area with entertainment.
- Neighborhoods – Home Park, Knight Park, Blandtown, and English Avenue as primarily lower density single family areas
- Arts/Education/Research District between Georgia Tech and Northyards with loft offices and restaurants.
- Westside Mixed Use District – along Huff Road.
- City Center – The far south of the study area should focus on tourism, entertainment and urban residences.

### Features

- Transit corridors along Marietta Street, Marietta Blvd, and Huff. Transit connection to Atlantic Station, the Georgia Aquarium, and Bankhead MARTA Station.
- Greenways along the Beltline, routed along Lowery
- Pedestrian streets including lower Marietta/Howell Mill, Northside Drive, Hollowell, and Huff
- Bikeways along Hemphill, Ferst, and Marietta
- Activity Nodes at Northside and Hollowell, Northside and Marietta, Marietta and Jones, 10<sup>th</sup> St and Howell Mill, King Plow
- Landmarks at Marietta Blvd and Hollowell, Jones and Marietta, Huff and Howell Mill
- Better east-west connections across Northside Drive into Home Park and Georgia Tech and smaller blocks in the Westside Center.

## **GROUP #3 SUMMARY**

### Goals

- Include a diversity of housing jobs, shopping, and recreation that can include people of all incomes and ages
- Improve the efficiency and safety of transportation functions
- Give people more travel choice, such as walking, bike and transit
- Get the most out of alternative transportation by making sure land use supports transportation investments
- Make it easier and more attractive to redevelop land that is already served by infrastructure
- Preserve historic character, and define historic character with a more precise definition than the age of the building
- Promote industrial materials, scale, and the character of the area, possibly using a design overlay
- Protect the diversity of smaller scale residential, commercial, and industrial uses from institutional expansion

### Districts

- ARTery – A district around Marietta and Howell streets with a mixed use, residential, post industrial aesthetic; Promote live/work, adaptive reuse, lofts, pedestrian connections.
- Knight Park – A historic, single family residential neighborhood.
- Huff Design – A diverse destination shopping district with industrial, show rooms, retail (home furnishings), live/work, light industry, office, warehousing.
- Waterworks – A green space open to use by nearby residents.
- Hollowell-Jefferson – A live/work district. Market the area as “the bounce” since the bankhead bounce dance is widely known. This area should be a mixed use, dense area with neighborhood commercial and affordable student housing .
- Antioch – This should be a mixed use, medium density residential area with some neighborhood retail (Publix).
- Jefferson Industrial – This area should be a light industrial area and an employment center (Mead, King Plow, Jail).

### Features

- Transit corridors along Northside Drive, along Marietta Road and Marietta Boulevard, and connecting to Bankhead MARTA station and Atlantic Station.
- Greenways along the unused rail corridor near Bedford Street and along Marietta Boulevard, possibly connecting to the Federal Consent Decree Area near Proctor Creek.
- Pedestrian streets and streetscapes along Marietta, Northside Drive, Howell Mill, Brady Avenue, Jefferson, Joseph Lowery, Hollowell, and North.
- Bikeways – Along the unused rail corridor by Bedford Street, connecting to the Proctor Creek area and Georgia Tech.
- Activity Nodes – Lowery and Hollowell, Marietta and Howell Mill, Marietta and Northside, and Bankhead MARTA.
- Landmarks at Jones and Marietta, at the Surrender of Atlanta, at Hollowell and Northside, at Huff and Howell Mill.
- Improved road networks in the area west of Home Park and in the area around Better Brands north of Jefferson. New roads connecting Knight Park with Huff Road, Jefferson with Marietta, and Howell Mill with Northside.

## **5 Questions and Comments**

One comment was submitted that encouraged a re-route of the Beltline along Donald Lee Hollowell and Joseph Lowery. This realignment might promote more activity and redevelopment at the proposed node of Lowery & Donald Lee Hollowell.



## Charrette Meeting Attendees

<b>Last</b>	<b>First</b>	<b>Display Name</b>	<b>Position</b>	<b>Organization</b>
Akins	Ed	Ed Akins		Smith Dalia Architects, LLC Blandtown
Arpad	James	James Arpad		Neighborhood
Bair	Suzanne	Suzanne Bair		Marietta St. Artery
Becton	Lois	Lois Becton		Mead Corp.
Blengini	Carolina	Carolina Blengini	Student	Georgia Tech
Boykin-Sm	Anne	Anne Boykin-Smith	Real Estate	Georgia Tech
Cain	Robert	Robert Cain	Architect	
Callaway	Jane	Jane Callaway		Callaway Properties
Cheatam	Richard	Richard Cheatem		HPICA
Dunkley	Bill	Bill Dunkley	Planner	City of Atlanta
Flaherty	Curt	Curt Flaherty		Marietta St. Artery
Flemming	Michael	Michael Flemming	Planner	City of Atlanta
Gammage	Henry	Henry Gammage		Gammage & Co
Gould	Bill	Bill Gould		Marketing
Hall	Shirely	Shirely Hall		Marietta St. Artery
			I-75 Northwest Corridor	Giant Lofts
Heimer	Crew	Crew Heimer	Transit Project Manager	GRTA
Innes	Pamela	Pamela Innes		
Johnston	Sylvia	Sylvia Johnston		NPU K
Jones	Bob	Bob Jones		Be Thursday
Kocher	Ronda	Ronda Kocher		Development Corp.
Meinhardt	Carl	Carl Meinhardt		Home Park
Parker-Jon	Robin	Robin Parker-Jones		Winter Properties
				ACORN Housing
Reagan	John	John Reagan	President	Urban Realty Partners
Seay	Bill	Bill Seay		HPCIA
Vlarde	Flor	Flor Vlarde	Planner	City of Atlanta
Whyte	Troy	Troy Whyte	Homeowner	

Advisory Committee Meeting #2  
Monday, November 8, 2004, 6:30 PM  
City of Atlanta Committee Meeting Room #1

**Attendees**

Bob Cain  
Ed Akins  
Suzanne Bair  
John Reagan  
Jia Li  
Flor Velarde  
Louis Merlin  
Liz Drake  
John Funny  
Saroeh Boonsiripant

**Map Review**

- Request to include two versions of the proposed Northside Traffic Circle; one version as shown and another that is of sufficient size to accommodate truck traffic

Upper Westside LCI  
Draft Presentation  
Thursday, November 11, 2004  
Concept Prioritization Exercise

Overall, participants assigned the highest priority to the street car/trolley loop along Northside Drive/Marietta Street/Howell Mill Road and the Surrender of Atlanta Park at the intersection of Howell Mill Road and Marietta Street.

Participants also placed an emphasis on the rezoning of land in the study area; pedestrian treatments, such as streetscapes, crossings and sidewalks; and the addition of open space with the study area.

Participants were the most ambivalent about the proposed Northside Traffic Circle, which received both very high and low priority scores.

### Ranking of General Concepts

	Average Priority	Responses	Overall Score
Street car/trolley	4.6	20	92
Surrender of Atlanta Park	4.8	17	82
Rezoning	4.1	19	78
Streetscapes	4.8	15	73
Pedestrian Crossings	4.8	15	73
Other Open Space	4.8	15	72
Sidewalks	4.9	14	69
Northside Traffic Circle	3.4	20	67
Intersection Improvements	4.7	13	62
Bike Paths	4.6	13	60
Design Overlay	4.1	14	58
Corridor Improvements	4.7	11	52
Greenways	4.8	10	48
New Streets	4.3	11	47
Other Transit Routes	4.9	7	34
Parking at Atlantic Station and Aquarium	5.0	1	5
Nodes	5.0	1	5
Lighting design	5.0	1	5

Participants cited access to green space around the Atlanta Waterworks as the highest priority for the addition of open space within the study area.

When identifying parts of the study area that should have the highest priority for rezoning, participants cited the English Avenue North area between Hollowell Parkway and Jefferson Street; Home Park West and the ARTery with a special emphasis along Marietta Street, Northside Drive and Howell Mill Road.

#### Ranking of Open Space and Rezoning

	Average Priority	Responses	Overall Score
<b>Other Open Space</b>			
Waterworks	5	8	40
English Avenue North	5	2	10
North Avenue and Marietta Street	5	1	5
Consent Decree Area (Procter Creek)	5	1	5
Northside Drive/Huff Road	5	1	5
South of 14 <sup>th</sup> (Home Park West)	5	1	5
Herndon Homes	4	1	4
GA Power @ along Lowery Boulevard	4	1	4
Urban plazas along all major streets	4	1	4
JSA McGill Linear to e/w	4	1	4
<b>Rezoning</b>			
English Avenue North	5	4	20
ARTery	4.8	4	19
West Home Park	5	3	15
Northside/14th	5	1	5
north of Howell Station	5	1	5
Brady/8th	5	1	5
West of rail line	5	1	5
Waterworks	4	1	4
All along Huff Road	5	1	5
All along Marietta	5	1	5

Participants, when assessing a transit route other than the proposed street car/trolley, cited the Beltline as the top priority.

Participants placed the highest priority on streetscapes for Marietta Street, Howell Mill Road, and Northside Drive.

#### Ranking of Transit Routes and Streetscapes

	Average Priority	Responses	Overall Score
<b>Other Transit Routes</b>			
Beltline	5	3	15
along Northside n/s	5	2	10
Link to Atlantic Station	5	1	5
Designated truck route	4	1	4
along 10th and 14th e/w	5	1	5
Marietta Street	5	1	5
<b>Streetscapes</b>			
Marietta Street	5	10	50
Howell Mill Road	4.8	6	29
Northside Drive	5	3	15
Marietta Blvd	5	1	5
Means Street	5	1	5
Lowery Boulevard	4	1	4
10th Street	5	1	5
Hollowell Parkway	3	1	3

Similar to the streetscapes ranking, participants saw the highest value in having sidewalks along Marietta Street, Howell Mill Road and Northside Drive.

Surveys also indicated a priority for pedestrian-friendly crossings at key intersections along Marietta Street and at the Bankhead Bridge connecting to the Means Street District.

#### Ranking of Sidewalks and Pedestrian Crossings

	Average Priority	Responses	Overall Score
<b>Sidewalks</b>			
Marietta Street	5	6	30
Howell Mill Road	5	5	25
Northside Drive	4.8	4	19
Marietta Blvd	5	1	5
Means Street	5	1	5
Huff Road	5	1	5
Hollowell Parkway	4	1	4
<b>Pedestrian Crossings</b>			
Northside Drive/Marietta Street	4.8	5	24
Bankhead Bridge	4.8	5	24
Howell Mill Road/Marietta Street	4.8	4	19
"Old" Jefferson east to Marietta Street	5	3	15
Lowery Boulevard/West Marietta Street	4.7	3	14
Northside Drive in Home Park	5	1	5
8th Street to GT	5	1	5
Marietta Street/Brady Avenue	5	1	5
Means Street/Marietta Street	5	1	5
Jett Street	5	1	5
Hemphill/Huff Road	5	1	5
Howard School	5	1	5
Northside Drive	5	1	5

Participants saw the highest value in having bike paths along Marietta Street and Howell Mill Road.

Survey results rated intersection improvements along Northside Drive as the most critical, including the intersections at Hemphill/14<sup>th</sup>, Marietta Street, and Hollowell Parkway.

#### Ranking of Bike Paths & Intersection Improvements

	Average Priority	Responses	Overall Score
<b>Bike Paths</b>			
Marietta Street	5	5	25
Howell Mill Road	5	3	15
"Old" Jefferson east to Marietta	5	2	10
Beltline	5	1	5
Jefferson Street/Lowery Boulevard	5	1	5
Bankhead Bridge link east	5	1	5
Along GT Pkwy to Luckie	5	1	5
<b>Intersection Improvements</b>			
Northside/Hemphill/14 <sup>th</sup>	5	5	25
Northside Drive/Marietta Street	5	2	10
Northside Drive/Hollowell Parkway	4	2	8
Northside Drive/10 <sup>th</sup> Street	5	1	5
Means Street/Marietta Street	5	1	5
Brady Avenue/West Marietta Street	5	1	5
Lowery Boulevard/Marietta Street	5	1	5
Marietta Street/Howell Mill Road	5	1	5
Marietta St/Marietta Blvd	5	1	5
Brady Avenue/Howell Mill Road	4	1	4



When identifying the critical new links in the roadway network of the study area, participants cited the Jefferson link to Marietta Street and the Ethel Street connection to Howell Mill Road.

Survey results rated most highly the proposed physical improvement of corridors along Marietta Street, Howell Mill Road, and Northside Drive.

#### Ranking of New Streets and Corridor Improvements

	Average Priority	Responses	Overall Score
<b>New Streets</b>			
East Jefferson to reconnect Marietta	5	3	15
Ethel/Howell Mill Connector	4.5	2	9
West Home Park	5	1	5
Fairmont/West Marietta	5	1	5
Jefferson to Hampton to Marietta	5	1	5
Lowery industrial to Jefferson to west/interstates	4	1	4
Willis	4	1	4
Baylor	4	1	4
<b>Corridor Improvements</b>			
Marietta Street	4.9	7	34
Howell Mill Road	5	5	25
Northside Drive	5	2	10
Marietta Blvd	5	1	5
Huff Road	4	1	4
Link west from industrial areas to interstates	4	1	4

Participants most often cited the use of greenways along underused rail corridors in the area, including the proposed Beltline concept.

#### Ranking of Greenways

	Average Priority	Responses	Overall Score
<b>Greenways</b>			
Beltline	5	2	10
Rail lines	5	2	10
Northyards to Bankhead	4.5	2	9
Marietta Street	5	1	5
Bedford	5	1	5
West Home Park	5	1	5
Waterworks	5	1	5
GT	5	1	5
Re-route along Lowery, not thru industry	4	1	4
Rail spur in English Ave north	4	1	4
Northyards spur to GT	4	1	4

# meeting summary

UPPER WESTSIDE LCI DRAFT PRESENTATION

THURSDAY, NOVEMBER 11, 2004

ANTIOCH BAPTIST CHURCH NORTH

540 KENNEDY STREET

## 1 General Comments from Survey

- Does not want the character Area name "ARtery"
- Marietta Street is mislabeled on a base map
- Check C Loop route – it may not correctly follow the rail
- Add "Improved" to "New Streets" in map legend
- Deal with homeless squatter camp under the Bankhead Bridge
- The western edge of Home Park should not be considered industrial
- See new streets as indicated in Mike Dobbins Planning Studio
- Refine concepts from the Greater Home Park Master Plan that already exist
- See proposed trolley layout on survey – how can it tie to the Beltline?
- Traffic circle is anti-pedestrian and uses a great deal of land
- Follow new streets as indicated in Greater Home park Master Plan
- Mandate controlled downlighting to prevent washing mixed residential properties with harsh security floodlights that are appropriate for industrial sites and parking lots
- Consent decree open space along Proctor Creek is larger than map illustrates

## Draft Plan Meeting Attendees

<b>Last</b>	<b>First</b>	<b>Display Name</b>	<b>Position</b>	<b>Organization</b>
Akins	Ed	Ed Akins		Smith Dalia Architects, LLC
Arpad	James	James Arpad		Blandtown Neighborhood
Bair	Suzanne	Suzanne Bair		Marietta St. Artery
Baker	Adam	Adam Baker		Atlantic Station
Becton	Lois	Lois Becton		Mead Corp.
Blengini	Carolina	Carolina Blengini	Student	Georgia Tech
Boonsiripant	Saroch	Saroch Boonsiripant		GRICE
Bowring	Jim	Jim Bowring		
Budram	Wyvern	Wyvern Budram		GRICE
Cain	Robert	Robert Cain	Architect	
Callaway	Jane	Jane Callaway		Callaway Properties
Carlsen	Ed	Ed Carlsen		Georgia Power
Cheatam	Richard	Richard Cheatem		HPICA
Contente	Terry	Terry Contente		Urban Collage
Dean	Linda	Linda Dean		Transformation Center
Flaherty	Curt	Curt Flaherty		Marietta St. Artery
Gammage	Henry	Henry Gammage		Gammage & Co Marketing
Goswick	Camille	Camille Goswick		The Story
Gould	Bill	Bill Gould		Marietta St. Artery
Gravel	Ryan	Ryan Gravel		Friends of the Belt Line
Heath	John	John Heath		
Hobbs	Comer	Comer Hobbs	President	Howell Station Neighborhood Association
Hughes	Robert	Robert Hughes		Urban Realty Partners
Innes	Pamela	Pamela Innes		
Jones	Bob	Bob Jones		Be Thursday Development Corp.
Li	Jia	Jia Li	Planner	City of Atlanta
Martin	Richard	Richard Martin		Midtown West
Meinhardt	Carl	Carl Meinhardt		Winter Properties
Murphy	Clinton	Clinton Murphy		
Reagan	John	John Reagan	President	Urban Realty Partners
Riley	Mark	Mark Riley		Urban Realty/ Puritan
Ruffin	Joel	Joel Ruffin	Citizen	
Scott	Reau	Reau Scott		Vine City
Seay	Bill	Bill Seay		HPCIA
Sewell	Marty	Marty Sewell		City of Atlanta
Vlarde	Flor	Flor Vlarde	Planner	City of Atlanta
West	Denton	Denton West		Brock Built
West	Michael	Michael West		West View
Whyte	Troy	Troy Whyte	Homeowner	Giant Lofts

# meeting summary

UPPER WESTSIDE LCI

OPEN HOUSE - THE FOUNDRY AT PURITAN MILL

THURSDAY, DECEMBER 16, 2004

## 1 Open House

- Stakeholders were able to review maps portraying recommendations for land use, zoning, open space, pedestrian improvements, green space, transportation improvements, and transit proposals.

## 2 Draft Recommendations Presentation

- Liz Drake of EDAW presented a summary of the study to date with an emphasis on recommendations.

## 3 Proposed Land Use and Zoning Changes

- Jia Li of the City of Atlanta made a presentation on the Quality of Life Zoning codes, the zoning process, and the ways rezoning support study area goals.

## 4 Public Review and Comments

The following is a summary of public comment and concerns:

- Some property owners were concerned about the proposed zoning changes. Some property owners wished to keep their existing zoning industrial for the development flexibility that industrial zoning allows.
- Some existing businesses were worried about getting kicked out of the neighborhood if an influx of mixed-use development comes to the area.
- One person suggested that there needs to be a process to address the fears of NPUs. He suggested that the plans needed to be presented to the NPUs early on.
- One property owner objected to displaying a proposed park that

included their property.

- One person suggested that a timeline for the plan approval process should be provided. They suggested that the process for taking public comments was not completely clear.
- One person suggested that the future commuter rail line be represented on the transit proposal map. He noted that there is the possibility of a commuter rail-beltline transfer station in the study area.
- One person suggested that Northside Drive be routed west of the proposed Surrender of Atlanta Park rather than east, thus allowing property owners along Northside to have continued access. He noted that one of the businesses on Northside has been in place 50 years.
- A few property owners suggested that notification of existing property owners was insufficient. One said that they heard about this study only through another study.

## **5 Written Comments**

The following concerns address specific implementation projects:

- Bankhead Bridge Connector – stakeholder is concerned that this connector will increase the number of homeless in the area.
- Northside Drive & Donald Lee Hollowell Parkway Corridor – There should also be a proposed Beltline Station on Hollowell between Lowery and Northside.
- English Avenue North Park – The Boys & Girls Club and The English Avenue High School would be ideal open spaces.
- Rezoning English Avenue North – This should be a higher density along the Hollowell Corridor – such as MRC-3 or MRC-3C
- Promote awareness of existing tax break programs for seniors – Also anything available for enterprise, minority business, not just seniors.

## Open House Attendees

<b>Last</b>	<b>First</b>	<b>Display Name</b>	<b>Position</b>	<b>Organization</b>
Akins	Ed	Ed Akins		Smith Dalia Architects, LLC
Arpad	James	James Arpad		Blandtown Neighborhood
Ball	Jennifer	Jennifer Ball		Central Atlanta Progress
Bartrell	Al	Al Bartrell		Public Policy America
Bascunana	Enrique	Enrique Bascunana		City of Atlanta
				English Avenue Development Corporation
Bates	Tracy	Tracy Bates		Fasher PTG
Berger	Martin	Martin Berger		Georgia Tech
Blengini	Carolina	Carolina Blengini	Student	GRICE
Boonsiripant	Saroch	Saroch Boonsiripant		Weaver & Woodberry
Brearley	James	James Brearly	Developer	HPICA
Cheatam	Richard	Richard Cheatem		MCN
Cherrie	Bob	Bob Cherrie		NAI Brannon Goddard
Clark	Charlie	Charlie Clark		Total Plant and Floral
Dawson	Alison	Alison Dawson		Transformation Center
Dean	Linda	Linda Dean		Pinnacle Partners
Eubanks	Hank	Hank Eubanks		Marietta St. Artery
Flaherty	Curt	Curt Flaherty		Floyd Kell Properties
Fuller	Gayle	Gayle Fuller		Gammage & Co Marketing
Gammage	Henry	Henry Gammage		C&W
Glover	Peter	Peter Govler		
Gordon	Theodore	Theodore Gordon	Property Owner	
Gould	Bill	Bill Gould		Marietta St. Artery
Gravel	Ryan	Ryan Gravel		Friends of the Belt Line
Haywood	Robert	Robert Haywood		Murray Mill
Hobbs	Comer	Comer Hobbs	President	Association
Hunter	Patricia	Patricia Hunter		
Innes	Pamela	Pamela Innes		
Jackson	Sharon Peel	Sharon Jackson		WPCS LLC
Jinkins	Charles	Charles Jinkins		
Koblentz	Mike	Mike Koblentz		NW Community Alliance
Levitan	Scott	Scott Levitan		Development Office
Lynch	Alrich	Alrich Lynch		Julian LeCraw
Manward	Till	Till Manward		
Martin	Richard	Richard Martin		Midtown West
McCord	Lisa	Lisa McCord		Sizemore Group
Mulkey	Michael	Michael Mulkey		MidAtlantic Financial
Murphy	Clinton	Clinton Murphy		
Pochar	Tom	Tom Pochar		Alliance Theatre
Rosenberg	Robin	Robin Rosenberg		RYP Properties
Schaffner	John	John Schaffner		The Story
Scott	Julian			
Self	Steve	Steve Self		
				Howell Station Neighborhood Association
Smith	Stephanie	Stephanie Smith	Chair	
Tadlock	Ed	Ed Tadlock		
Tedesco	Anthony	Anthony Tedesco		
Thomas	Drewnell	Drewnell Thomas		NPU K
Thompson	Donna	Donna Coleman Thompson	Business Owner	
Toney	Alan	Alan Toney	Property Owner	
Vlarde	Flor	Flor Vlarde	Planner	City of Atlanta
Weaver	Jay	Jay Weaber		Weaver & Woodberry
West	Michael	Michael West		West View
White	Max	Max White		Avantis
Whyte	Troy	Troy Whyte	Homeowner	Giant Lofts



# APPENDIX B

# TRANSPORTATION



## INTRODUCTION

As part of establishing a series of improvements, programs or plans to initiate a livable center, the current conditions, including those for transportation, must be evaluated. This effort includes review and location of existing transportation facilities and operational conditions within the Upper Westside LCI study area. The results of the existing conditions analysis will be used as the stepping stone for the development of alternative transportation improvements, which will enhance the livability of the community while meeting the intent of the Livable Centers Initiative (LCI) program.

The overall study area is generally bounded by Northside Drive and Tech Parkway on the east, Luckie Street, Jones Avenue, Railroad tracks and Bankhead Avenue on the south, railroad tracks parallel to Marietta Boulevard on the west, and Culpepper Road on the north. A general location map is provided in **Figure 1**.



**Figure 1 - Upper Westside (LCI) Study Area**

## ROADWAY NETWORK IN THE AREA

The existing transportation system within the Upper Westside LCI study area includes a network of state and local roadways serving residential, business and regional transportation needs. The current residential and commercial areas of Upper Westside are provided with local and regional transportation access via primarily two-lane roadways.

The area has three major north-south transportation corridors – Marietta Boulevard, Howell Mill Road, and Northside Drive. The major east-west corridor is along Donald Lee Hollowell Parkway and West Marietta Street. These corridors connect to other centers in the City of Atlanta, including Buckhead to the north, the Bolton Road area to the west and downtown along the south. These corridors also feed into nearby I-85, I-75, and Marietta Boulevard, which continues northwest into Cobb County.

Truck routes heavily exist within the study area and include West Marietta Street, Marietta Boulevard, Joseph Lowry Boulevard, Jefferson Street, Northside Drive and Donald Lee Hollowell Parkway. Industrial establishments are key truck traffic generators and are well spread out within the study area with greater concentrations in the centre of the study area along West Marietta Street and Lowery Boulevard. Relatively lesser concentrations of industries are located along Marietta Boulevard, Howell Mill Road and Donald Lee Hollowell Parkway corridors. **Figure 2** below illustrates the truck routes within the Upper Westside LCI study area.



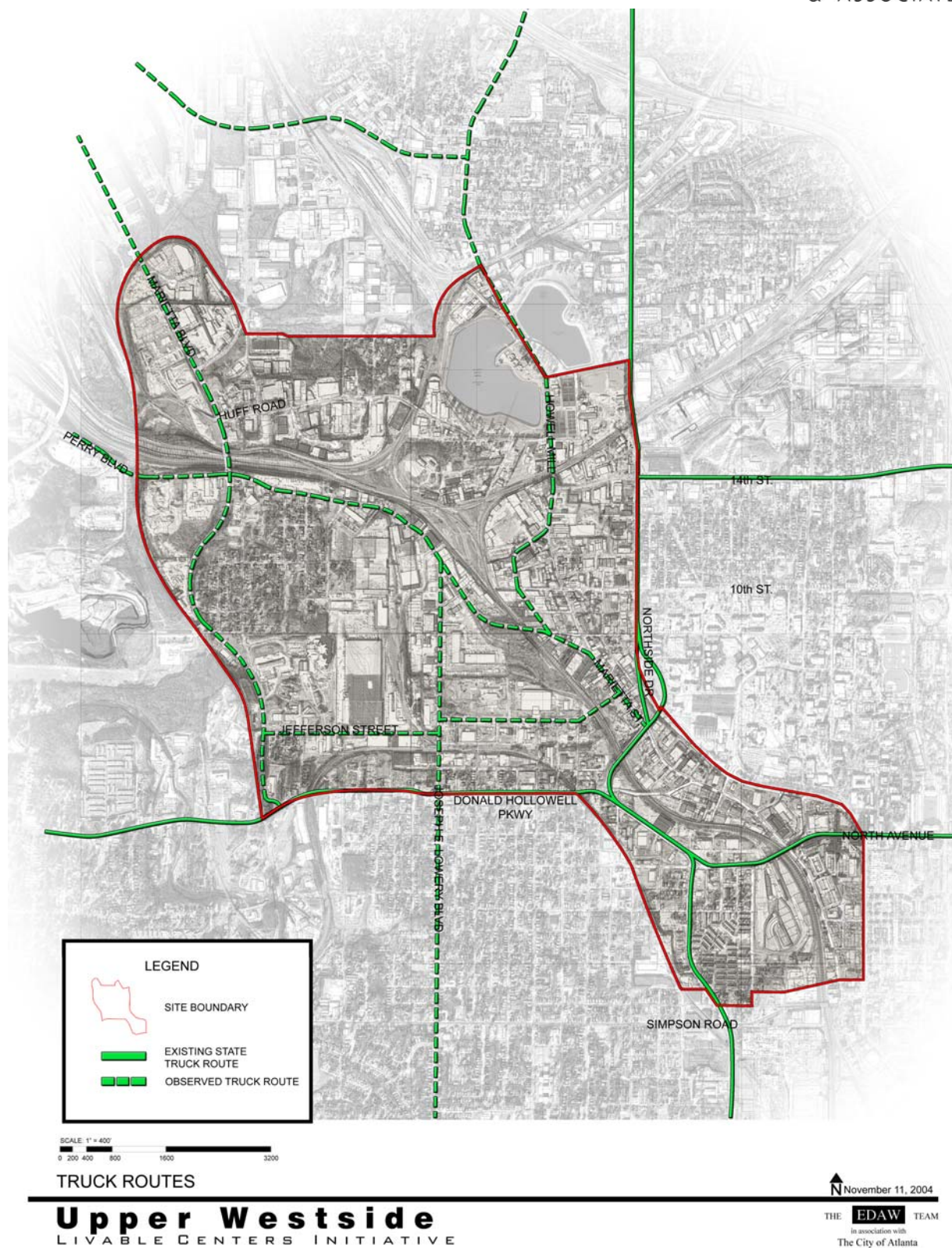
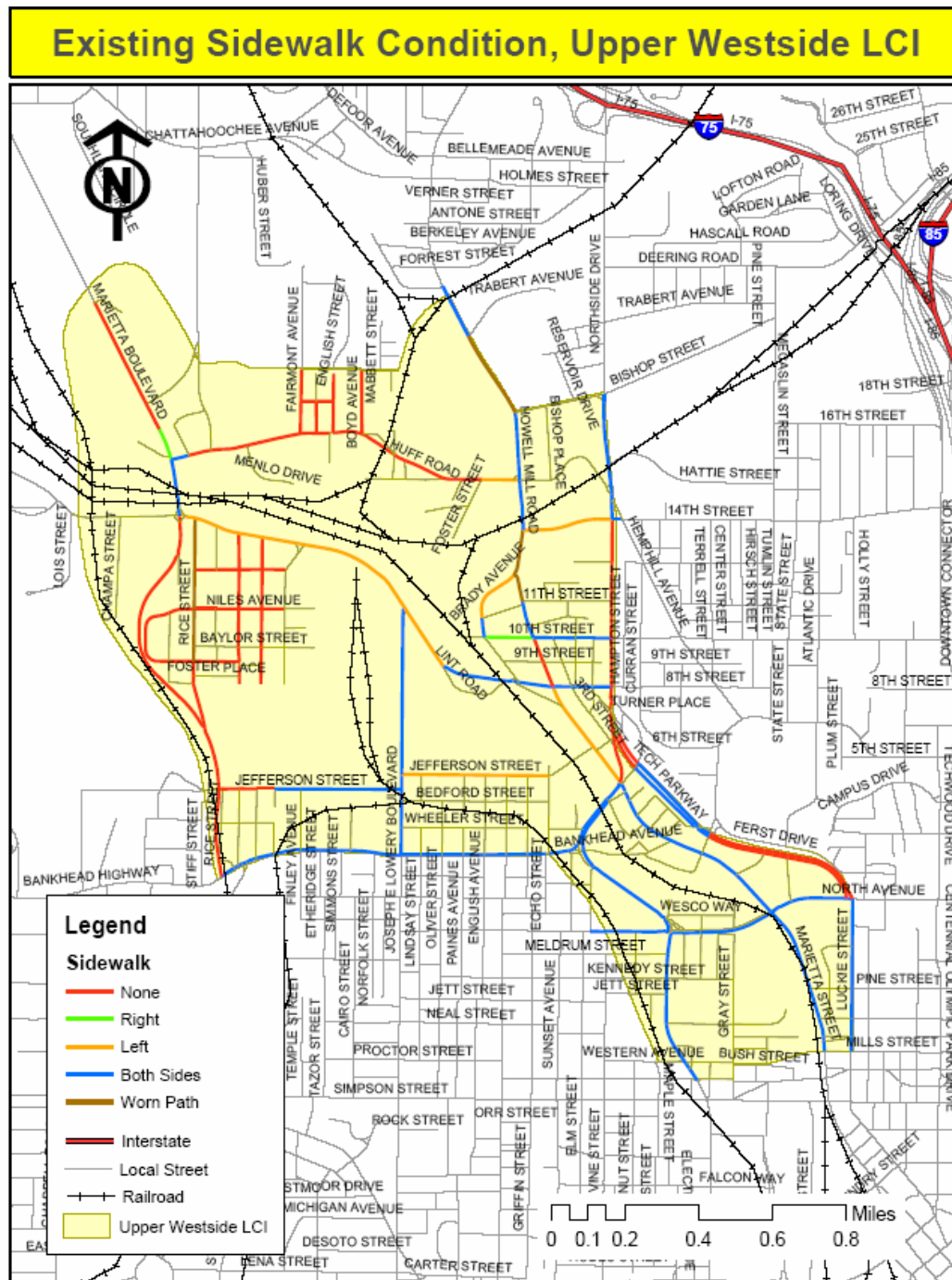


Figure 2 - Truck Routes

## SIDEWALKS

An inventory of existing sidewalk within the LCI has been developed. Field observations were carried out to determine existing sidewalk conditions in the study area. **Figure 3** presents the findings from the observations.



**Figure 3 - Existing Sidewalk Condition**

As shown in **Figure 3**, the southeast corner of the study area sidewalks are present on both sides of the road along Donald Lee Hollowell Parkway, Northside Drive and Marietta Street. On Tech Parkway while there are no sidewalks from Donald Lee Hollowell Parkway to Mean Street, there are sidewalks on both sides of the road from Mean Street to Northside Drive. Sidewalks are present on both sides of the street along Joseph Lowery Boulevard and along Jefferson Street from Joseph Lowery Boulevard to Law Street.

On the west side of the study area there were no sidewalks along most of Marietta Boulevard, Niles Avenue, Church Street, Tilden Street, and Longley Avenue. Worn paths indicating evidence of pedestrian movements were observed along Rice Street. There were sidewalks on one side of the road along majority of West Marietta Street. On the north side of the study area there were no sidewalks along Huff Road, Fairmont Avenue, English Street, and Boyd Avenue. On the northeast side of the LCI, sidewalks were seen on either one side or on both sides, except on Northside Drive from Tech Parkway to Fourteenth Street and on Howell Mill Road from Eighth Street to Tenth Street.

Worn paths along the roadway indicating evidence of pedestrian movement was observed on Howell Mill Road from Eleventh Street to Fourteenth Street and from Bishop Street to Trabert Avenue. It should be noted that the areas illustrating worn paths should be targeted for sidewalk installation as there is evidence of pedestrian activity at these locations.

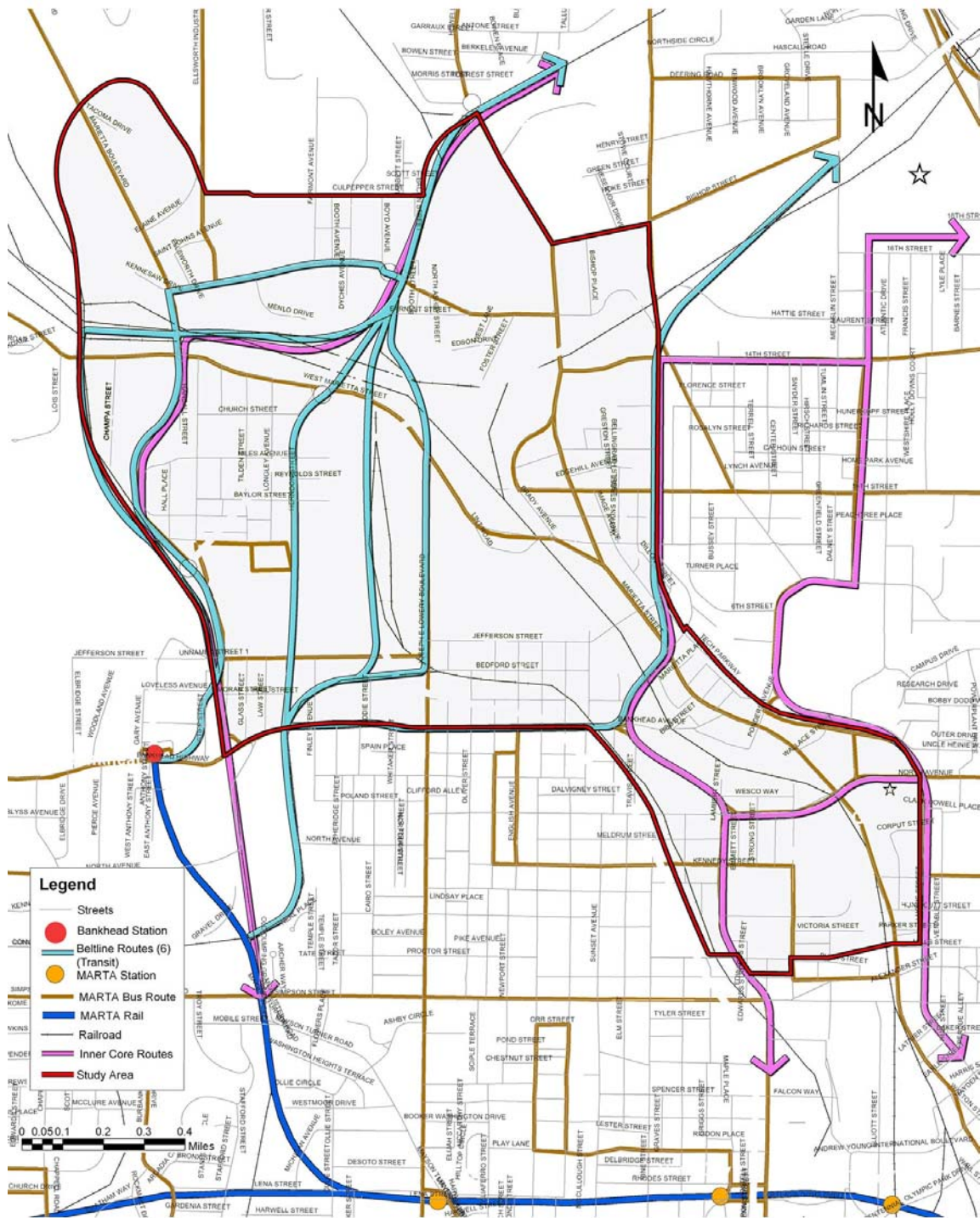
## TRANSIT SERVICE

Transit facilities in the area were studied closely and the inventory included MARTA bus routes, MARTA rail routes, inner core routes and Beltline routes. Current and programmed transit facility and service improvements were obtained from the Atlanta Regional Commission (ARC), the Beltline study and MARTA. **Figure 4** below illustrates these routes.

Bankhead MARTA station connects into the study area in the southwest corner. The rail line south of the study area feeds into MARTA bus routes that service the LCI area. MARTA bus lines are available along key corridors that include Marietta Boulevard, Jefferson Street, Joseph Lowery Boulevard, Donald Lee Hollowell Parkway, Northside Drive, North Avenue, and Howell Mill Road.

Programmed transit facilities in the study area include the Beltline and the MARTA inner core line. There are six alternative routes for the Beltline study that are proposed to run within the study area. All of the alternatives run north-south in the study area and two of them connect into Bankhead MARTA station. The Beltline orientations and the location of the stations are indicated in **Figure 4**. The proposed MARTA inner core line within the study area is planned to run parallel to Marietta Boulevard on the west and Northside Drive on the east of the LCI study area.





TRANSIT SYSTEMS AND ROAD NETWORK SOURCE: Grice & Associates

December 15, 2008

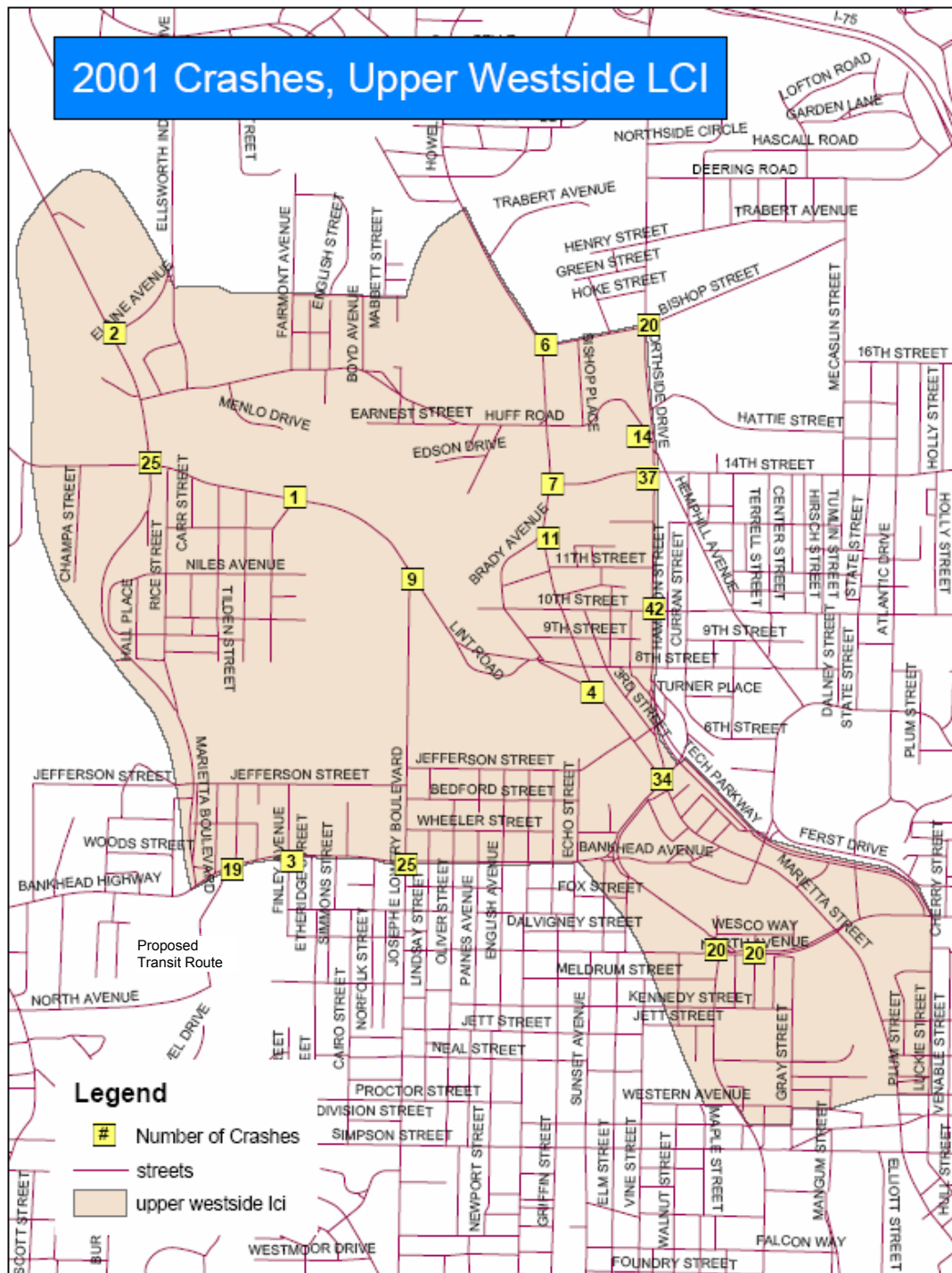
**Upper Westside**  
LIVABLE CENTERS INITIATIVE

GRICE & ASSOCIATES  
in association with  
The City of Atlanta

Figure 4 – Upper Westside Transit System

## CRASH HISTORY

Two years of summary incident statistics were obtained from GDOT database. **Figures 5 and 6** provide the location and number of crashes for the two individual years at key intersections within the Upper Westside study area.



**Figure 5 – Crashes in year 2001**

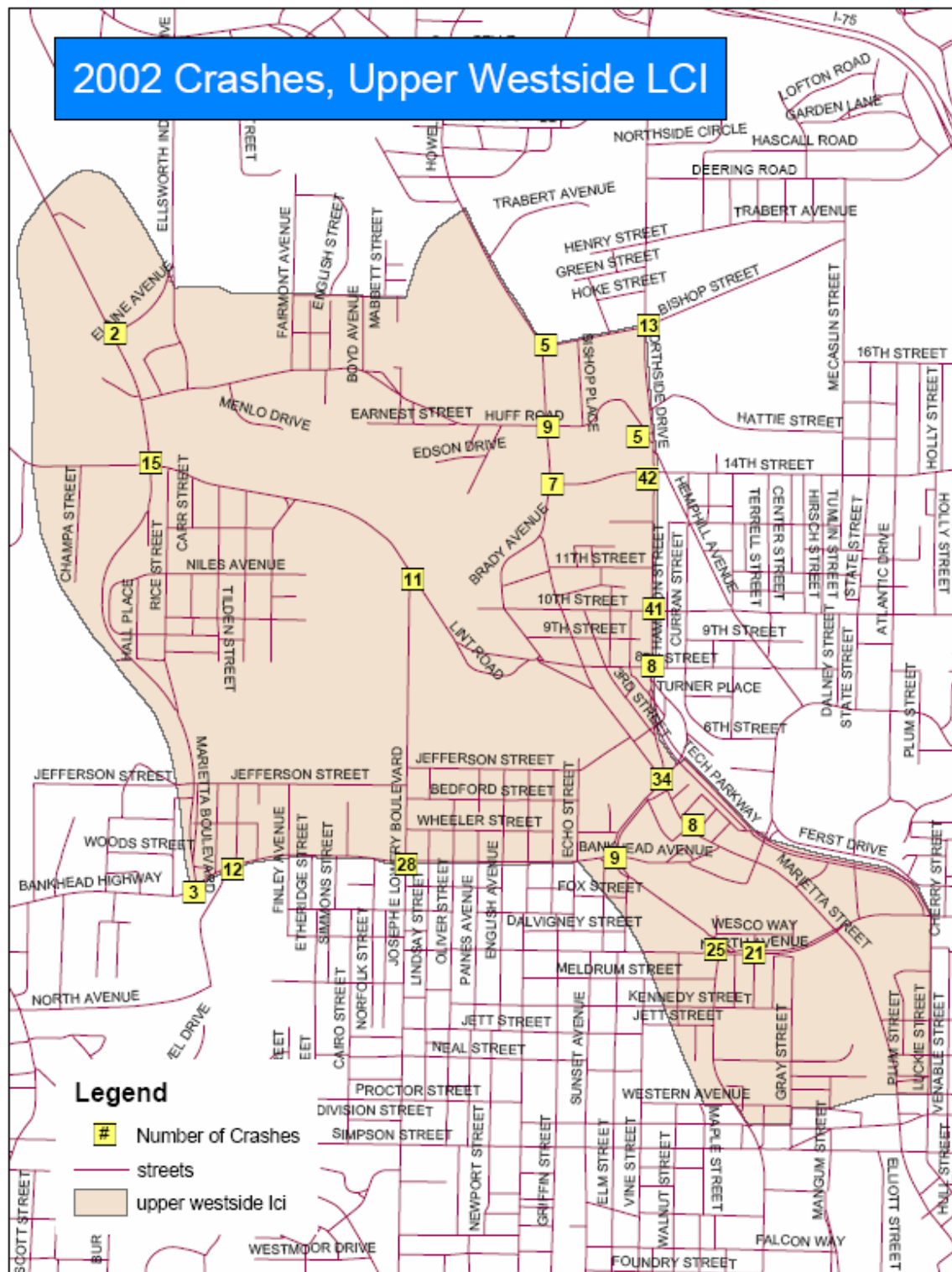


Figure 6 – Crashes in year 2002



In 2001, the highest number of crashes was reported at the intersection of Northside Drive and Tenth Street with a total of forty two crashes. This was followed by the intersection of Fourteenth Street and Northside Drive with thirty seven, intersection of Northside Drive and Marietta Street with thirty four crashes, and the intersections of Donald Lee Hollowell Parkway and Joseph Lowery Boulevard, and Marietta Boulevard and West Marietta Street with 25 crashes each. **Figure 5** provides the number of crashes at these critical locations in the study area.

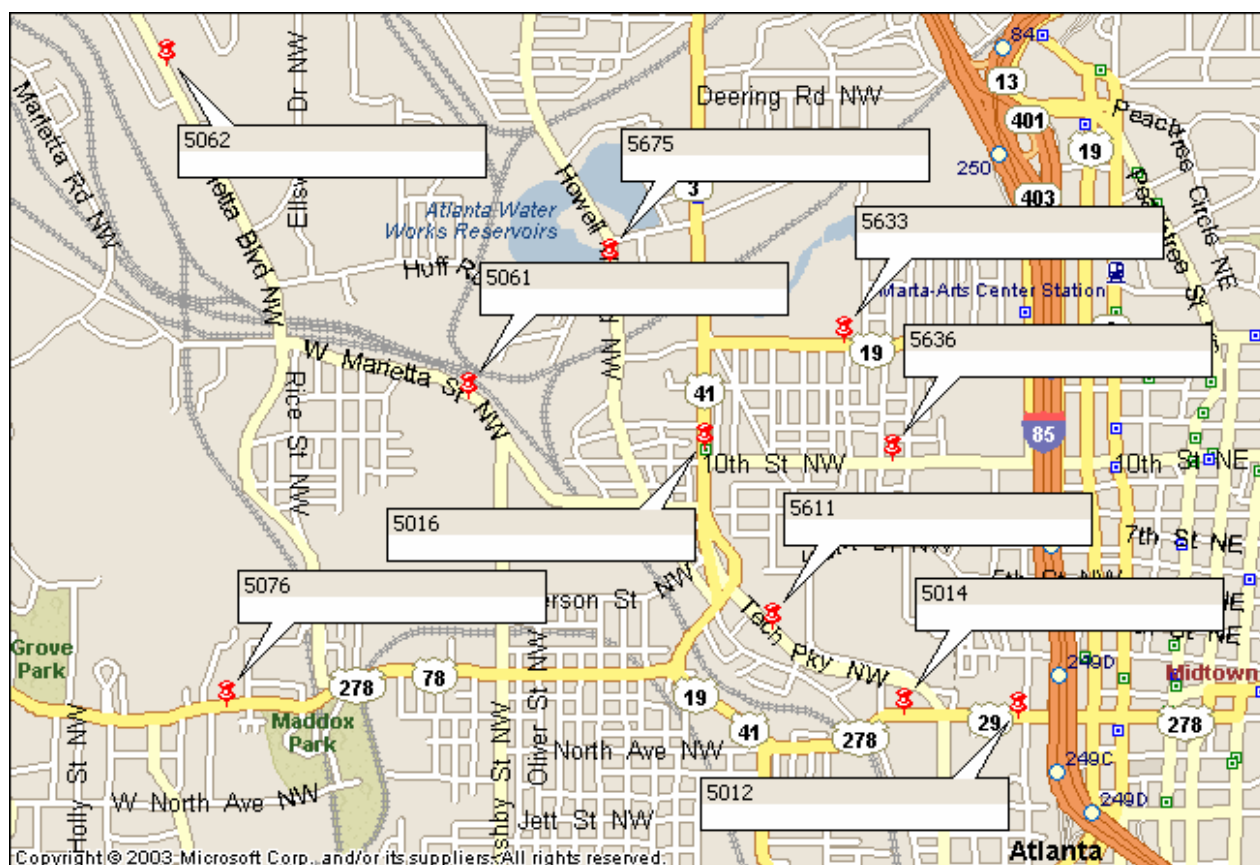
In 2002, the highest number of crashes was reported at the intersection of Northside Drive and Fourteenth Street with a total of forty two crashes. This was followed by the intersection of Tenth Street and Northside Drive with forty one crashes, the intersection of Northside Drive and Marietta Street with thirty four crashes, and the intersections of Donald Lee Hollowell Parkway and Joseph Lowery Boulevard with twenty eight crashes. **Figure 6** provides the number of crashes at these critical locations in the study area.

## **HISTORICAL ADT AND GROWTH RATES**

Historic Average Annual Daily Traffic (AADT) within the study area was obtained from Georgia Department of Transportation (GDOT) database for the time period from 1998 to 2002. AADT values were obtained from ten different count stations on all major roadways with the LCI study area. These volumes are summarized in **Table 1** and the count station locations are illustrated in **Figure 7**. Based on the AADT values, average increase traffic volume per year and annual average growth rates were calculated for each of the count stations. These are presented in **Table 1**.

**Table 1 - Historical AADT**

Street	Count Station Number	1998	1999	2000	2001	2002	Average Increase per year	Annual Rate of Growth
Bankhead Ave	5076	15379	17600	16240	16790	17226	462	3.17%
Marietta Blvd	5062	14200	15411	15187	15589	15859	415	2.86%
Marietta Street	5061	14479	15714	15314	15979	16255	444	3.01%
Tech Parkway	5611	11856	12437	12777	13263	13492	409	3.29%
Tenth Street	5636	16279	17077	18883	17232	17530	313	2.12%
Fourteen Street	5633	13897	12562	14920	15931	18877	1245	8.61%
North Avenue	5014	11980	13595	12486	12564	12855	219	2.07%
North Avenue	5012	22168	25485	24457	24829	25405	809	3.69%
Northside Drive	5016	23750	26995	26129	26614	27231	809	3.66%
Howell Mill Road	5675	15200	22404	19829	20811	21171	1493	10.65%
AVERAGE		5280	15919	17928	17622	17960	18590	4.31%



**Figure 7 - Count Station Locations**

The historical traffic counts show a strong upward trend in traffic volumes in the study area, with an average growth rate of 4.31%. Relatively stable trends are observed in the vicinity of the study area with the exception of Howell Mill Road and Fourteenth Street, where steep growth rates approaching 10% were observed.

## EXISTING AND FUTURE CAPACITY ANALYSIS

### *Arterial Capacity Analysis*

The ARC model was utilized in the highway systems analysis for existing conditions. Prior to the analysis, the Average Daily Traffic (ADT) in the travel demand model was compared to the ADT at Georgia Department of Transportation (GDOT) count stations for validation purposes.

Volumes were compared on five major functional classes - Interstate Principal Arterial, Principal Arterial, Minor Arterial, Major Collector, and Minor Collector. Where ARC volumes were significantly lower than the collected volumes, the volume on the GDOT count station was used in the analysis. In cases where there was only one GDOT count station available within a series of roadway links in the travel demand model, the adjacent links represented in the ARC model were adjusted upward accordingly until a point was reached along the roadway corridor where

the ARC forecast volume was within the acceptable range of the GDOT count. In areas where there were no existing count data available, the ARC volume was used.

A key element of the roadway design process is the provision of acceptable traffic operations and sufficient capacity for flexible operations. The key performance measures to assess design options consist of traffic Level of Service (LOS), intersection delay, and the intersection volume to capacity ratio. Delay is expressed in seconds per vehicle and provides a measure of driver frustration that could lead to unsafe gap acceptance behaviors, and traffic violations such as red light running. The LOS is a qualitative rating of intersection performance that is related to the average total delay per vehicle.

Unsignalized intersection LOS becomes unacceptable (LOS E) at an average delay of 35 seconds per vehicle, and failure (LOS F) occurs at a delay of 50 seconds per vehicle. Signalized intersection level of service becomes unacceptable (LOS E) at an average delay of 55 seconds per vehicle, and failure (LOS F) occurs at 80 seconds per vehicle. While the previously mentioned thresholds specifically apply to intersection LOS, the same concepts can be applied to highway systems analysis to conduct an area wide, planning level assessment of a highway system.

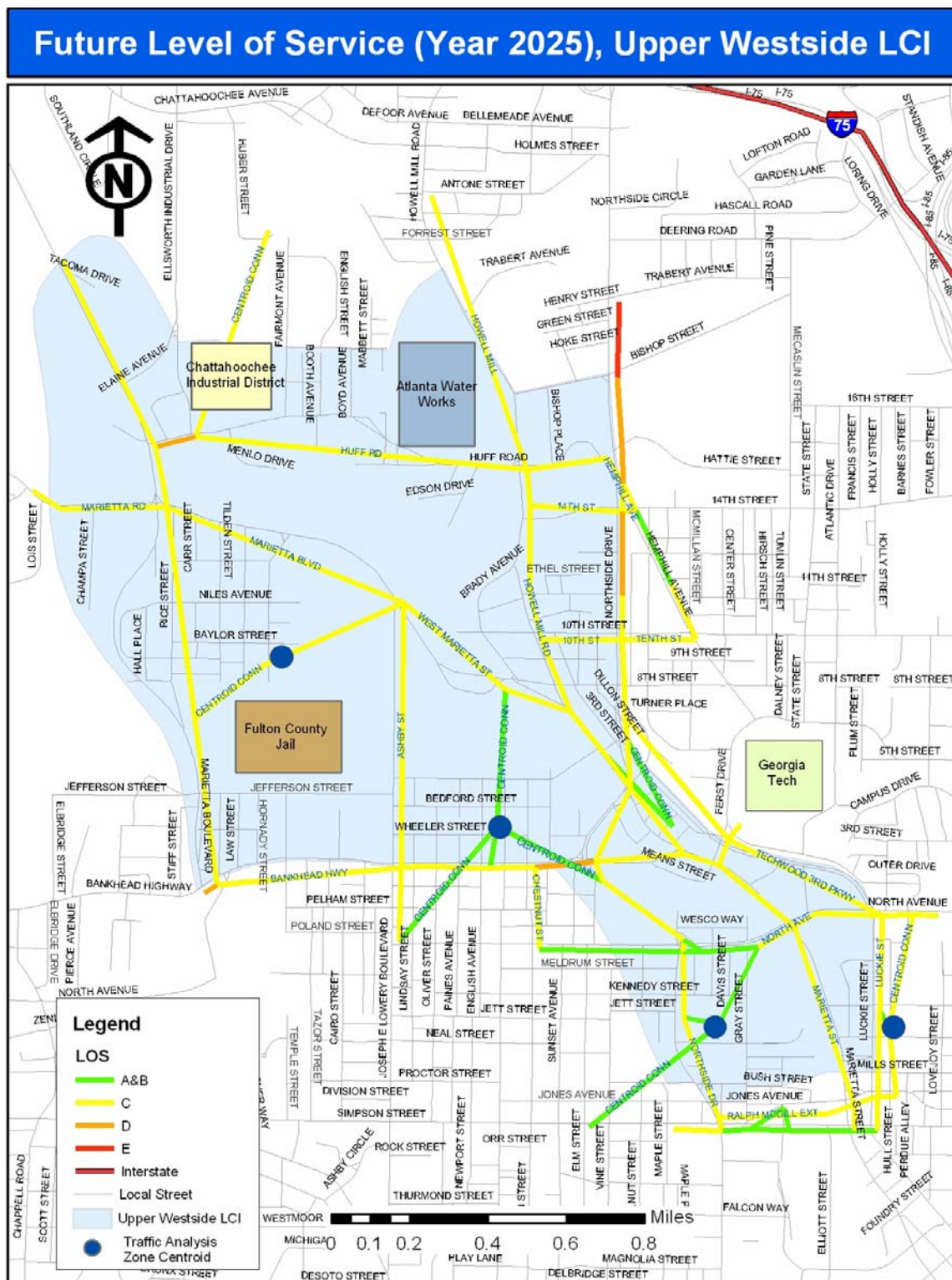
The ARC model highway system LOS analysis was conducted using the methodology developed by the Florida Department of Transportation and accepted by the Georgia Regional Transportation Authority (GRTA). The Florida DOT methodology factors in the intersection performance measures mentioned above to determine link volume thresholds that correspond with a particular LOS. The volume thresholds are segregated by functional class, area type, and number of lanes for a particular facility.

The existing transportation system Levels of Service (LOS) and system needs based upon existing design and operating capacities is illustrated in **Figure 8**. Under existing conditions most roadways within the LCI study area were operating with LOS C or better with a few exceptions. Sections of Donald Lee Hollowell Parkway and Hampton Street/Northside Drive operate at LOS F. Huff Road operates at LOS D, while Howell Mill Road, West Marietta Street, Lowery Boulevard, Marietta Boulevard and other major roads operate at LOS C or better as indicated in **Figure 8**.





Capacity analysis was performed for the future year 2025 using the ARC model. **Figure 9** illustrates the LOS levels along different roadways in the area for 2025.



### Figure 9 – Future Year 2025 Level of Service

Under future conditions most roadways within the LCI study area would operate with LOS C or better with a few exceptions. Sections of Northside Drive from Eleventh Street to Bishop Street and from Bishop Street to Trabert Avenue operate at LOS levels of C and D respectively as indicated in **Figure 9**. In comparison to existing conditions, the future capacity results show better LOS levels overall. Improvements are especially prominent along Huff Road and Donald Lee Hollowell Parkway. This is because the future year ARC model incorporates all programmed transportation projects including those from TIP and RTP in the study area.

### ***Intersection Capacity Analysis***

In addition to analyzing arterials, key intersections in the LCI study area were Identified and analyzed for traffic operations. These intersections are Marietta Boulevard at West Marietta Street, Donald Lee Hollowell Parkway at Northside Drive and Howell Mill Road at Bishop Street. The intersection of Howell Mill Road at Bishop Street is Stop controlled while the other intersections are signalized. Turning movement counts were collected at these locations in December 2004. Signal timing information was obtained from City of Atlanta. Synchro software version 6.0, that is consistent with the Highway Capacity Manual (HCM) 2000, was used to perform the capacity analysis. The volume and timing information was input into Synchro and the capacity analysis was conducted. Existing and future year 2019 scenarios were considered for analysis purposes. Based on the historic growth rates 4% annual growth in traffic volumes was used in the capacity analysis. The resulting LOS values for each of the intersection are summarized in **Table 2**.

Table 2 Intersection Capacity Analysis Results

Intersection	LOS Levels					
	Existing			Future		
	AM	Midday	PM	AM	Midday	PM
Marietta Boulevard at Marietta Street	C	B	C	F	D	F
Donald Lee Hollowell Parkway at Northside Drive	B	B	F	C	C	F
Howell Mill Road at Bishop	F	F	F	F	F	F

As is shown in the table the intersection of Howell Mill Road at Bishop Street fails during all three peak periods in existing and future scenarios. This is due to heavy traffic on Howell Mill Road leading to excessive delays on Bishop Street. The intersection of Donald Lee Hollowell Parkway at Northside Drive operates at LOS F in the Pm peak period under existing conditions. This is due to the inadequate capacity on the southbound approach on Northside Drive.

In the future scenario all the three intersection fail in the AM and PM peak periods with the exception of Donald Lee Hollowell Parkway at Northside Drive, which operates at LOS C in the AM peak. It should be noted that the future scenario analysis does not consider any programmed improvements to roadways and is a projection of the future performance with existing roadway conditions. It is expected that with the implementation of planned transportation projects the operations would improve considerably.

## **CAPACITY ANALYSIS FOR FUTURE LAND USE**

Changes to existing land use patterns will affect the nature of the current transportation conditions. Evaluation of impacts to transportation system due to changes in land use patterns is vital for true assessment of transportation conditions. Hence arterial operational analysis was performed and Levels of services along major arterials in the LCI study area were calculated.

The difference in traffic generated from existing and future land uses was evaluated using procedures provided in the ITE Trip Generation Manual. These additional traffic volumes were loaded onto the ARC model for the year 2025, and the arterials were analyzed for LOS levels. **Figure 10** illustrates the LOS levels in the LCI study area with future land use patterns

## Future Level of Service (Year 2025), Upper Westside LCI

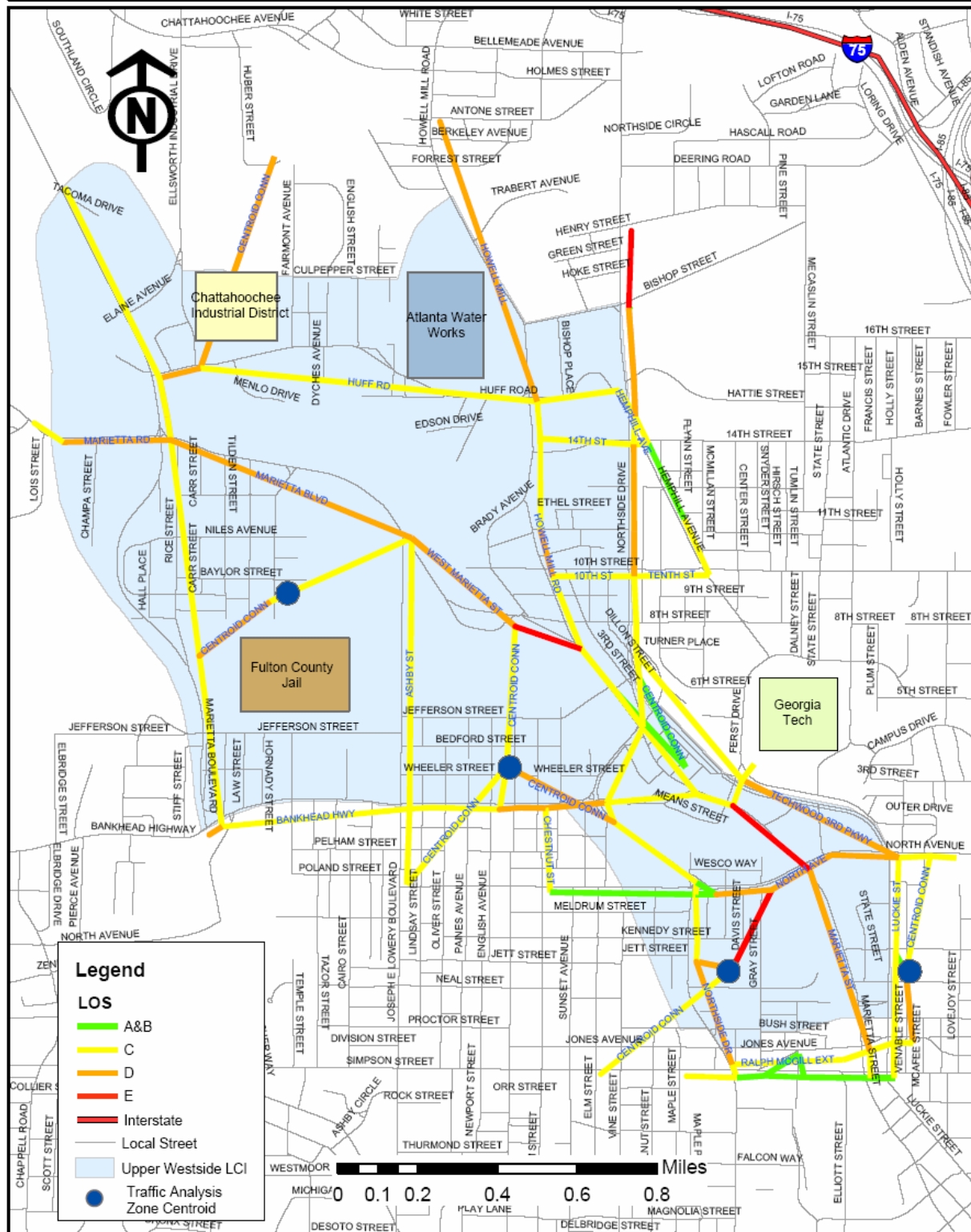


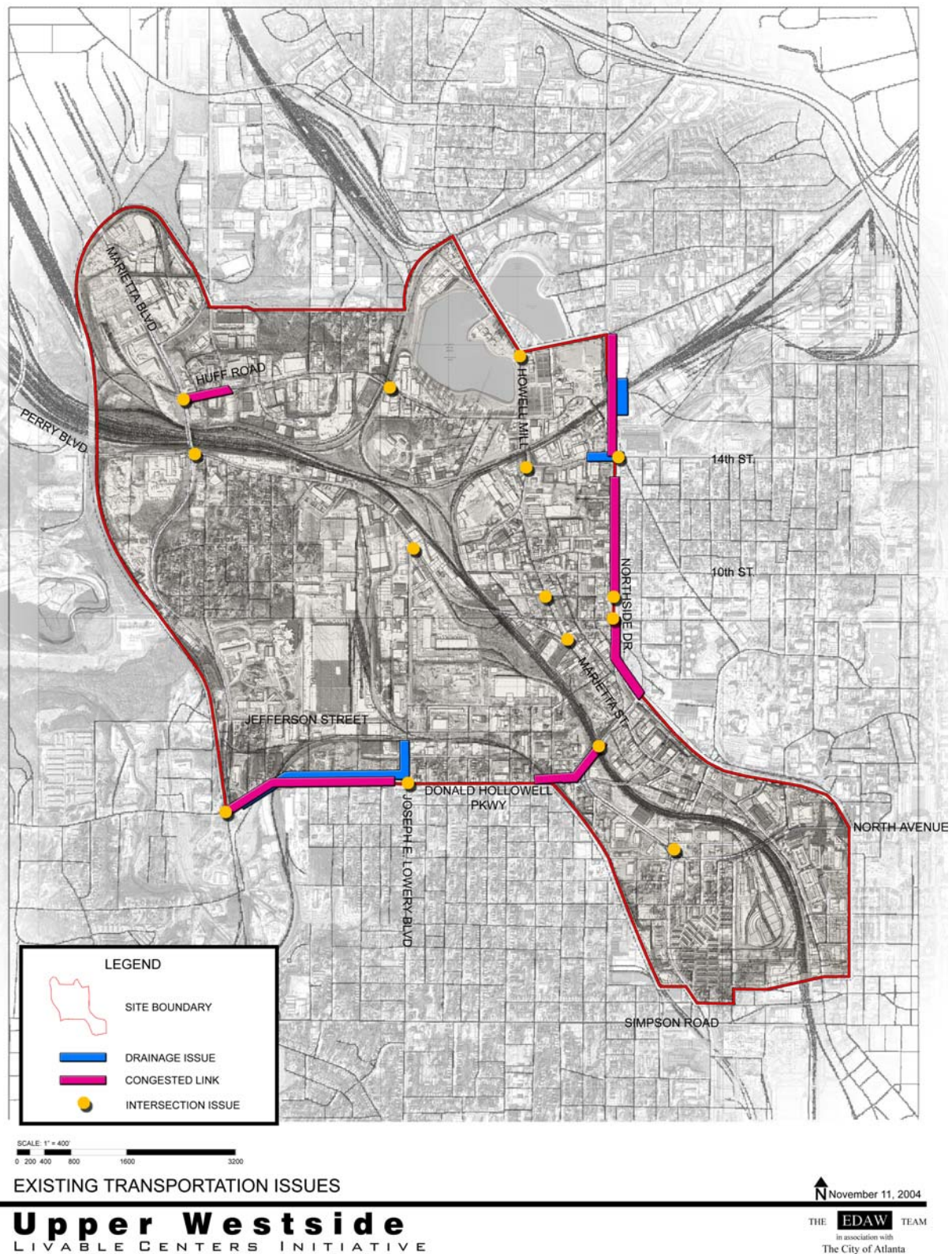
Figure 10 Level of Service with Future Land Use Pattern



As shown in Figure 9, most of the roadway segments within the study area continue to operate with LOS C or better. Majority of West Marietta Street has LOS D with the sections just west of Howell Mill Road and north of North Avenue operating at LOS E. Howell Mill Road north of Huff Road and Northside Drive north of 10<sup>th</sup> Street operate with LOS D. In general majority of the roadways are operating at reasonable levels, although there are sections that would near their capacities under the future land use scenario.

## IDENTIFIED TRAFFIC ISSUES

The roadway network and intersections within the LCI study area were surveyed and studied to identify transportation related issues. **Figure 11** highlights roadway segments and intersections where transportation issues were identified.



**Figure 11 –Transportation Issues**

Drainage issues were identified along four different segments as shown in **Figure 11** – Northside Drive at railroad over bridge, Fourteenth Street at Northside Drive, Donald Lee Hollowell Parkway from Marietta Boulevard to Joseph Lowery and Joseph Lowery Boulevard from Donald Lee Hollowell Parkway to railroad crossing. The issues observed in these areas include broken curb and gutter, very few catch basins, roadside curb on the same elevation with pavement leading to washing of silt onto pavement. On the northeast corner of the study area, Northside Drive passes under a railroad bridge with a steep sag, leading to water stagnation in the area.

Field observations on congested areas match existing capacity analysis findings on the different roadways. The identified congested segments are indicated in **Figure 11** and include Donald Lee Hollowell Parkway on the southwest corner, segments of roadway on Northside Drive and section of Huff Road just east of Marietta Boulevard.

Transportation issues were identified at numerous intersections within the LCI area. These issues are summarized below –

- Bishop Street and Howell Mill Road
  - Vertical curve on Howell Mill in combination with tight turning radii at the intersection, result in difficult turning maneuvers. There are guard rails and fence lines located too close to the intersection.
- Northside Drive and 14<sup>th</sup> Street
  - Close proximity to intersections of Hemphill with 14<sup>th</sup> Street and Northside Drive causes numerous traffic issues. Based upon the location of this intersection with respect to Hemphill, it creates congestion due to the close spacing within the tight triangular roadway system. Also, the signals for the three closely located intersections should be coordinated for effective traffic flow/progression. Additionally, the geometry should be improved to reduce the amount of crashes and to improve the overall operations, which will improve the LOS.
- Northside Drive and 10<sup>th</sup> Street
  - The westbound approach on 10<sup>th</sup> Street is on a downward grade as it intersects with Northside Drive. Potential for rear end crashes as vehicles approach the intersection.
- West Marietta Street and Lowery Boulevard
  - Acute angled intersection of approaches, resulting in difficult turning maneuvers. Need to upgrade signals and pedestrian facilities.
- Northside Drive and Marietta Street
  - Five approaches intersect at angles leading to potential driver confusion. Operational issues due to tight turning radii in presence of heavy truck traffic. Old signal equipment and non ADA compliant pedestrian ramps will need to be upgraded.
- Donald Lee Hollowell Parkway and Lowery Boulevard
  - Utility poles are located close to curb of the intersection. Heavy truck traffic with tight turning radius could potentially affect utility facilities in close proximity to the intersection.
- Northside Drive and North Avenue

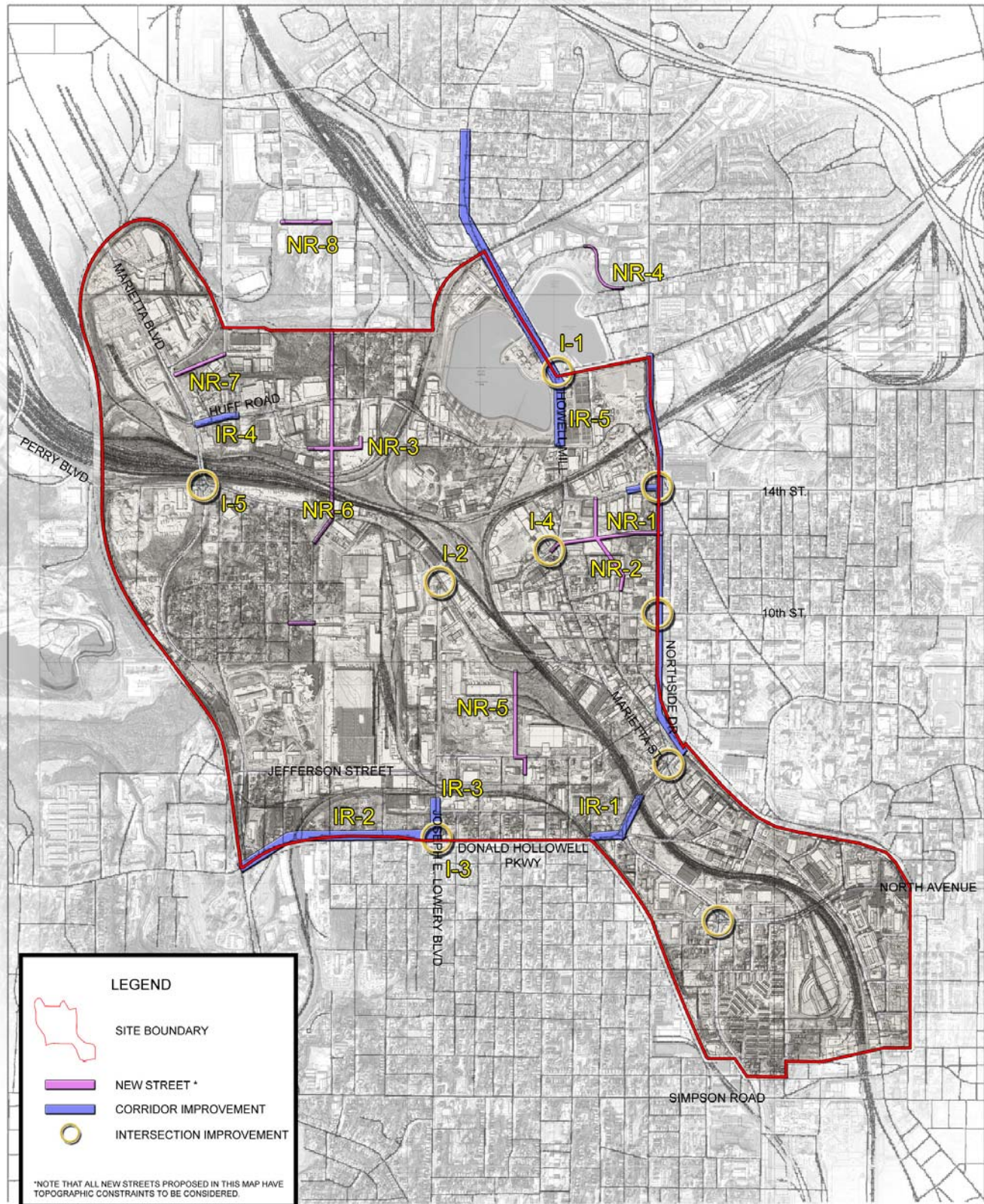
- Numerous US routes intersect together leading to potential driver confusion. Roadway alignment could be improved for better operations.
- Brady Avenue and Howell Mill Road
  - Brady Avenue intersects Howell Mill Road at an acute angle leading to inefficient intersection operations.
- West Marietta Street and Marietta Boulevard
  - Poor pavement and pedestrian ramp conditions were observed.

Transportation projects have been recommended to address all of the above mentioned issues. These recommendations are discussed in detail in following section of this report.

### **Transportation Improvements**

The transportation study recommends numerous improvements to enhance overall operations within the LCI area. The recommendations are based on study of historic traffic data, crash experience, analysis of key intersections and arterials in the LCI area, and survey of intersection and corridor operations. These transportation improvements are intended to improve and enhance the overall safety and function of the current transportation system. The recommended improvements are grouped under three major categories, namely, Intersection Improvements, Roadway Improvements, and New Roadways. **Figure 12** illustrates the location of the recommended projects and the following sections summarize the recommended projects and provide detailed descriptions.





**Figure 12 –Recommended Transportation Improvements**

***Recommended Intersection Improvements:***

- Bishop Street and Howell Mill Road (Project: I-1)
  - Study for potential signalization needs. Intersection geometry enhancements to improve turning radii, vertical roadway curvatures and approach alignments.
- Northside Drive and 14<sup>th</sup> Street
  - Close Hemphill from 14<sup>th</sup> Street to Northside Drive. Northside Drive will be accessed through other north-south access streets in Home Park, such as Curran, Flynn, and McMillan. Hemphill will end in a dead end, but pedestrian access will be possible through to the intersection. The signal at the intersection of Hemphill and Northside will be removed.
- Northside Drive and 10<sup>th</sup> Street
  - Intersection geometric enhancements to include sight distance and roadway grade improvements.
- West Marietta Street and Lowery Boulevard (Project I-2)
  - Roadway realignment, signal upgrade, pedestrian facilities upgrade and roadway rehabilitation are recommended.
- Northside Drive and Marietta Street
  - Intersection geometric improvements that address approach alignments, and turning radii is recommended. Signals and pedestrian facilities should be upgraded.
- Donald Lee Hollowell Parkway and Lowery Boulevard (Project I-2)
  - Intersection geometric improvements to improve turning radii at the intersection and utility poles relocation.
- Northside Drive and North Avenue
  - Intersection project to include geometric improvements for improved roadway alignment.
- Brady Avenue and Howell Mill Road (Project I-4)
  - Intersection geometric improvement to include realignment of Brady Avenue to intersect Howell Mill Road at 90 degrees.
- West Marietta Street and Marietta Boulevard (Project I-5)
  - Intersection Project to include roadway rehabilitation.

***Roadway Improvements:***

- Northside Drive Corridor
  - Along Northside Drive from Bishop St south to Marietta Street. Roadway improvement project to include drainage system improvement, access management through median treatment, signal upgrade, signal timing study
- Donald Lee Hollowell Parkway Corridor (near Northside Drive intersection) (Project: IR-1)
  - Along Donald Lee Hollowell Parkway from the railroad track going east to Northside Drive. Roadway improvement project include capacity improvement,

geometric improvement at the intersection of Donald Lee Hollowell Parkway & Northside Drive

- Donald Lee Hollowell Parkway Corridor (Project: IR-2)
  - Along Donald Lee Hollowell Parkway between Marietta Boulevard and Joseph Lowery Boulevard. Roadway improvement project to include drainage system improvement, roadway capacity improvement
- Lowery Boulevard Corridor (Project: IR-3)
  - Along Lowery Boulevard from Donald Lee Hollowell Parkway to Jefferson Street. Roadway improvement project to include drainage system improvement
- Huff Road Corridor (Project: IR-4)
  - Huff Road east of Marietta Blvd. Roadway improvement project include capacity improvement
- Howell Mill Road Corridor (Project: IR-5)
  - A consistent 4-lane corridor along Howell Mill Rd throughout the study area.

***New Roadways:***

- Extend Ethel Street from Home Park to Howell Mill Road (Project: NR-1)
  - Two lane new roadway with sidewalks, right-of-way acquisition. Traffic crossing Northside Drive will be restricted by median on Northside Drive.
- A new north-south link between Howell Mill Road & Northside Drive from 14th St. to 11th St. (Project: NR-2)
  - Two lane new roadway with sidewalks, right-of-way acquisition.
- Extend Menlo Drive into loop with Huff Road. (Project: NR-3)
  - Two lane new roadway with sidewalks, right-of-way acquisition.
- Reconnect Trabert Avenue around Waterworks (Project: NR-4)
  - Two lane new roadway with sidewalks, right-of-way acquisition.
- A new north-south link between Better Brands & Georgia Power, from Jefferson Street north to Kim King apartments (Project: NR-5)
  - Two lane new roadway with sidewalks, right-of-way acquisition.
- Knight Park-Huff Road connector (Project: NR-6)
  - Extend Fairmont south across railroad to Church Street. New 2-lane bridge with sidewalks connecting over rail line.
  - Note: This connection could also be used as a corridor for the Beltline transit and greenway.
- A new east-west link from Marietta Boulevard to Ellsworth Industrial Drive (Project: NR-7)
  - New street with sidewalks bordering the south side of the park proposed as project number OS-7.
- A new east-west link from Fairmont Avenue to Huber Street (Project: NR-8)
  - New street connecting the far north end of Fairmont to the far south end of Huber.





# APPENDIX C

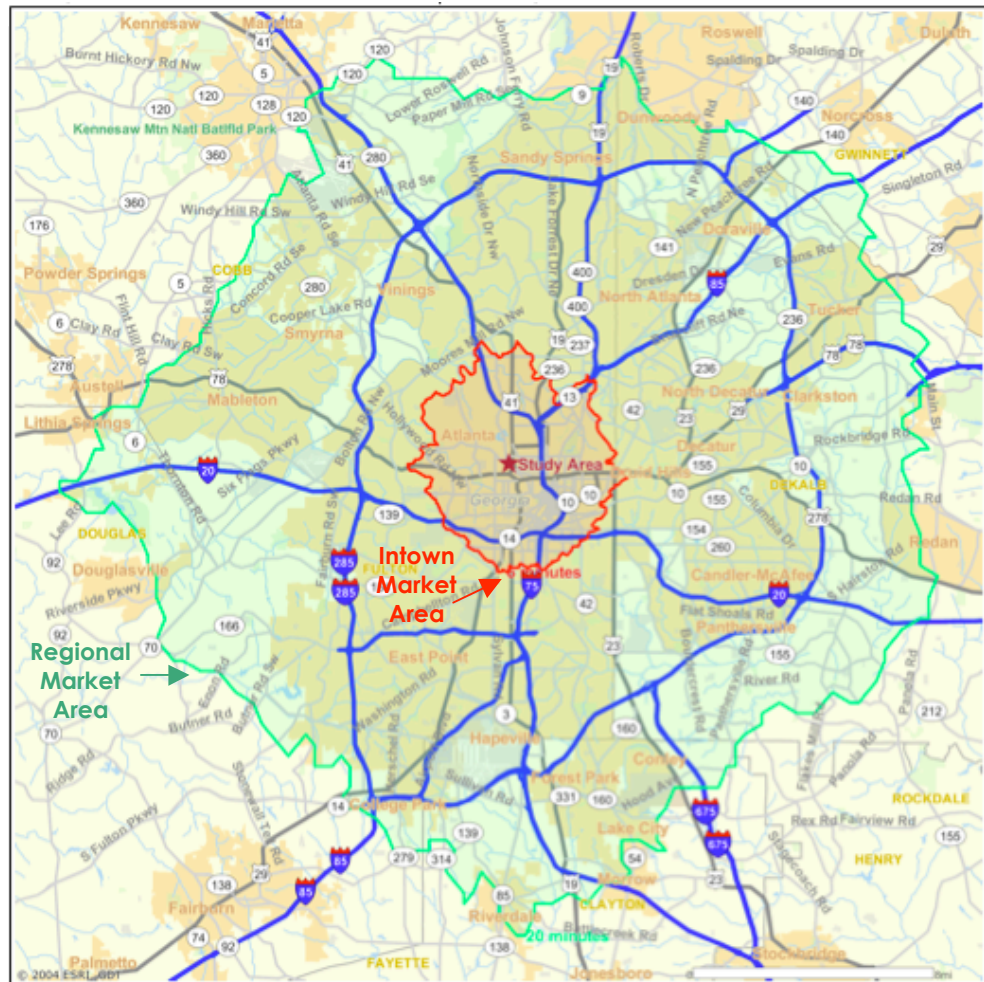
## MARKET AND DEMOGRAPHIC ANALYSIS



## DEMOGRAPHIC PROFILE

The socioeconomic characteristics of households key to the redevelopment of the study area – Intown and Regional Market Area residents – are provided in this section. Intown and Regional Market Areas (shown on the map below) are the geographic areas from which the large majority of potential customers and residents of new housing emanate and are based on drive time estimates, geographic and man-made boundaries and the location of existing competitive supply. The Intown Market Area population (defined by a six-minute drive from the intersection of Howell Mill Road and Marietta Street, approximately a four-mile radius) will look to the study area for specialty shopping, entertainment and convenience related goods and services. The Regional Market Area is much larger (defined by a 20-minute drive, approximately a 12-mile radius) and is the area from which a majority of “destination” shoppers and residents of newly developed housing in the study area emanate.

## Intown and Regional Market Areas



The delineation of the Intown and Regional Market Areas is not meant to suggest that prospective customers of study area businesses and residents of new housing will be drawn solely from these geographic areas. Because of the study area's location, competitive assets and ongoing and proposed redevelopment activity, prospective retail customers and residents will also be drawn from outside of the corresponding market areas. Comparisons with the study area, the City of Atlanta, the Atlanta MSA and the State of Georgia are made where appropriate. Demographic and economic trends are analyzed for the 1990-2009 timeframe.

### **Population & Household Growth**

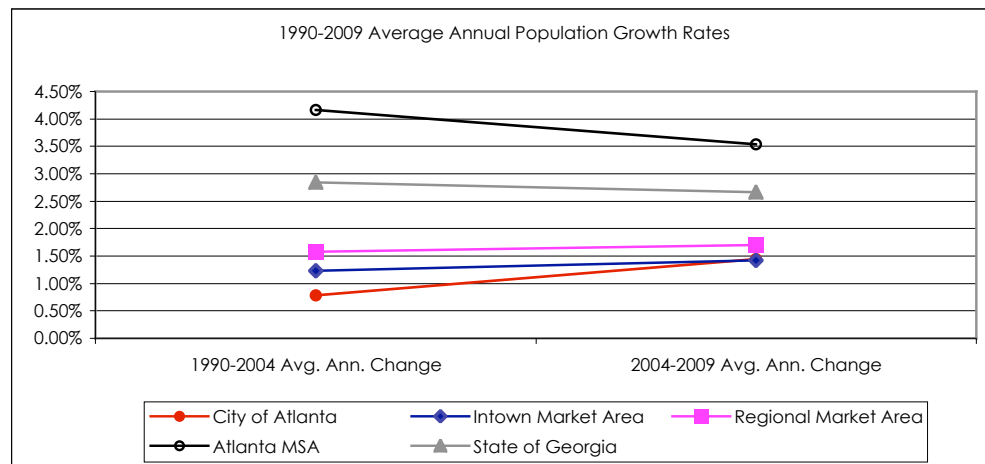
- The 2000 population of the study area was 4,992 people, down from 5,056 in 1990. Historically an industrial/distribution district, the study area has a restricted residential base. However, recent and ongoing redevelopment activity is reversing this trend. Since 2000, 704 apartment units have been completed in the study area; a 1,200-bed private student housing development is underway; and 383 townhouse and condominium units are already or will soon be underway. Assuming a household size of only two persons, recent and current large-scale residential projects will expand the study area population by 3,374 persons – a 68% increase in only four years, which does not include scattered site infill development.
- Exhibit EC-1 on the following page shows that population growth rates in the City of Atlanta and the Intown and Regional Market Areas have lagged behind MSA and State levels since 1990. As the appeal of intown living gains momentum, population growth rates in all three geographic areas are expected to build momentum over the next five years.
- The 2004 population of the City of Atlanta is estimated at 434,771, increasing at an annual rate of 0.79% since 1990. During the 2004-2009 period, the city's population growth rate is expected to almost double to 1.44% annually. The city's annual household growth rate (1.03%) was above population growth in the 1990s, which is expected to continue during the 2004-2009 period.
- The 2004 Intown Market Area population is estimated at 157,106 and 1,424,666 within the Regional Market Area. Since 1990, average annual population growth within the Intown Market Area (1.23%) trailed slightly behind Regional Market Area growth (1.58%), which is expected to continue over the next five years (1.42% and 1.70%, respectively). Household growth in both areas is expected to outpace population growth during the 2004-2009 period.
- Between 1990 and 2004, population growth within the Atlanta MSA was extremely strong, increasing at an average rate of 4.16% annually. In the 1990s, population growth within the Atlanta MSA was largely fueled by a booming economy. Between 2004 and 2009, population growth in the Atlanta MSA is expected to remain strong but decrease to 3.54% annually.
- Population and household growth in the State of Georgia during the 1990s was above growth levels within the Intown and Regional Market Areas and city, but below growth levels experienced in the Atlanta MSA. In

2000, the State of Georgia ranked fourth nationally in terms of its numeric growth rate as its population increased 26.4% from 1990-2000; the national average growth rate was 13.2%. California, Texas and Florida experienced more total growth than Georgia, but much of the growth in those three states has been due to immigration. Projections for the State of Georgia for the next five years reveal some slowing in the average annual growth rate to 2.66%.

EXHIBIT EC-1

POPULATION GROWTH  
City of Atlanta, Intown Market Area, Regional Market Area, Atlanta MSA and State of Georgia  
1990-2009

Geographic Area	1990	Avg. Ann. Change 1990-2004			Avg. Ann. Change 2004-2008		
		2004 (Estimate)	Number	Percent	2009 (Forecast)	Number	Percent
<b>City of Atlanta</b>							
Population	391,646	434,771	3,080	0.79%	466,057	6,257	1.44%
Households	154,916	177,251	1,595	1.03%	191,617	2,873	1.62%
Avg. Household Size	2.39	2.29	-0.007		2.28	-0.002	
<b>Intown Market Area</b>							
Population	134,020	157,106	1,649	1.23%	168,235	2,226	1.42%
Households	56,198	67,453	804	1.43%	73,436	1,197	1.77%
Avg. Household Size	2.08	1.97	-0.008		1.97	0.000	
<b>Regional Market Area</b>							
Population	1,166,190	1,424,666	18,463	1.58%	1,546,118	24,290	1.70%
Households	467,403	563,833	6,888	1.47%	613,211	9,876	1.75%
Avg. Household Size	2.43	2.44	0.001		2.44	0.000	
<b>Atlanta MSA</b>							
Population	3,069,425	4,857,497	127,719	4.16%	5,716,654	171,831	3.54%
Households	1,140,843	1,777,332	45,464	3.99%	2,090,708	62,675	3.53%
Avg. Household Size	2.65	2.69	0.003		2.70	0.002	
<b>State of Georgia</b>							
Population	6,478,216	9,052,085	183,848	2.84%	10,256,467	240,876	2.66%
Households	2,366,615	3,339,872	69,518	2.94%	3,798,970	91,820	2.75%
Avg. Household Size	2.66	2.64	-0.001		2.64	0.000	



Source: ESRI BIS

- In the past few decades, household size declined nationally due to a decrease in fertility rates, increasing divorces and single person households and a rise in the elderly population. Exhibit EC-1 shows that over the next five years household size is expected to remain relatively constant in each of the five geographic areas.

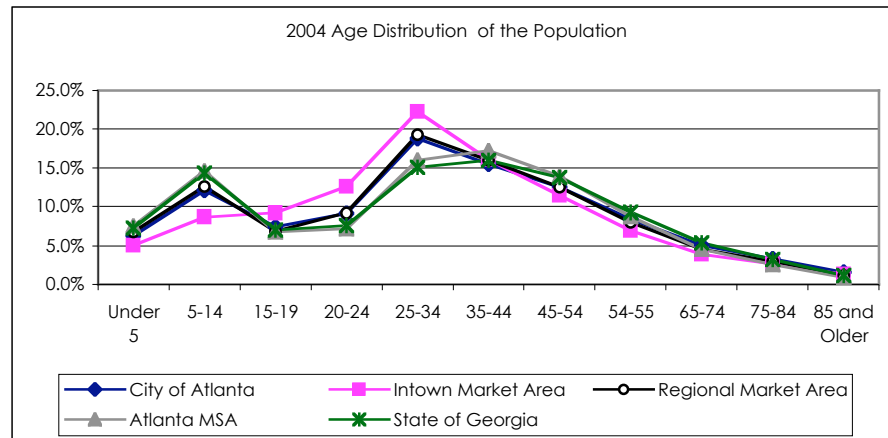
### Age Distribution

- The "close-in" population (i.e., City of Atlanta, Intown and Regional Market Areas) is slightly younger than MSA and state populations. The estimated median age of the Intown Market Area is 31.4 years, 32.6 years within the Regional Market Area and 33.1 years citywide. MSA and state residents are slightly older: 33.8 years and 34.2 years, respectively. In 2000, the median age among study area residents was only 31.7 years.
- Within the Intown Market Area, the estimated proportion of the population under the age of 15 in 2004 is 14%, below 19% in the Regional Market Area, 18% in the City of Atlanta and 22% in the MSA and state.

EXHIBIT EC-2

POPULATION BY AGE  
City of Atlanta, Intown Market Area, Regional Market Area, Atlanta MSA and State of Georgia  
2004

Age Category	City of Atlanta	Intown Market Area	Regional Market Area	Atlanta MSA	State of Georgia
Under 5	6.3%	5.1%	6.8%	7.5%	7.3%
5-14	12.1%	8.7%	12.6%	14.6%	14.3%
15-19	7.5%	9.2%	6.8%	6.8%	7.0%
20-24	9.1%	12.6%	9.2%	7.2%	7.6%
25-34	18.8%	22.2%	19.3%	16.0%	15.0%
35-44	15.5%	16.0%	16.0%	17.2%	16.0%
45-54	12.5%	11.4%	12.5%	13.9%	13.7%
55-64	8.4%	6.9%	8.1%	8.8%	9.3%
65-74	5.1%	3.9%	4.6%	4.5%	5.4%
75-84	3.3%	2.6%	3.0%	2.6%	3.2%
85 and Older	1.5%	1.3%	1.2%	0.9%	1.1%
Total	434,771	157,106	1,424,666	4,857,497	9,052,085
Median Age	33.1	31.4	32.6	33.8	34.2



Source: ESRI BIS

- An estimated 22% of the Intown Market Area population is age 15 to 24 in 2004, considerably above 16% in the Regional Market Area, 17% in the city, 14% in the MSA and 15% statewide. Not surprising, the Intown Market Area has fewer children but a high proportion of young adults.
- Prime consumer age categories, ages 25 to 64, make up 54% to 57% of the Intown and Regional Market Area, city, MSA and state populations. There is also little variation in the share of residents age 65 years or older among the five geographic areas, ranging from 8% to 10%.

### Household Income Distribution

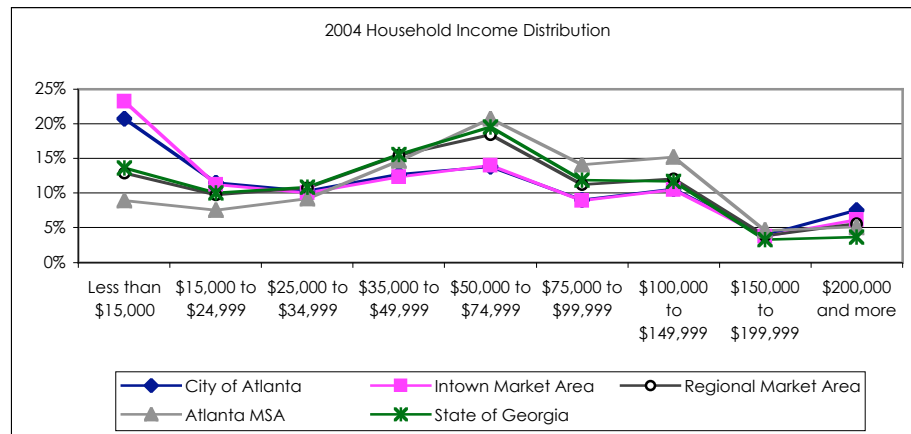
- Exhibit EC-3 shows that on the whole, Intown and Regional Market Area, city and state residents are less affluent than Atlanta MSA households but more in line with households nationwide. Estimated 2004 median household income ranges from as low as \$41,211 in the Intown Market Area to \$51,275 in the Regional Market Area, compared to \$61,142 for the MSA as a whole. Nationwide, the 2004 estimated household median income is \$48,124. The median income of study area households was only \$15,926 in 2000, which has almost certainly increased with new housing development.

EXHIBIT EC-3

#### HOUSEHOLD INCOME

City of Atlanta, Intown Market Area, Regional Market Area, Atlanta MSA and State of Georgia  
2004

Income	City of Atlanta	Intown Market Area	Regional Market Area	Atlanta MSA	State of Georgia
Less than \$15,000	20.8%	23.2%	12.9%	8.9%	13.6%
\$15,000 to \$24,999	11.5%	11.2%	9.7%	7.5%	10.0%
\$25,000 to \$34,999	10.3%	10.0%	10.8%	9.2%	10.8%
\$35,000 to \$49,999	12.7%	12.3%	15.4%	14.7%	15.5%
\$50,000 to \$74,999	13.8%	14.0%	18.4%	20.7%	19.5%
\$75,000 to \$99,999	9.0%	8.9%	11.2%	14.1%	11.8%
\$100,000 to \$149,999	10.6%	10.5%	12.0%	15.2%	11.6%
\$150,000 to \$199,999	3.9%	3.8%	3.9%	4.6%	3.3%
\$200,000 and more	7.5%	6.1%	5.6%	5.1%	3.7%
Total	177,251	67,443	563,833	1,777,332	3,339,872
Median	\$43,174	\$41,211	\$51,275	\$61,142	\$50,024



Source: ESRI BIS

- Despite below average median incomes within the “close-in” area, there are clearly nearby pockets of wealth. For instance, 8% of City of Atlanta and 6% of Intown Market Area households have incomes of \$200,000 or more, compared to 5% among MSA households.

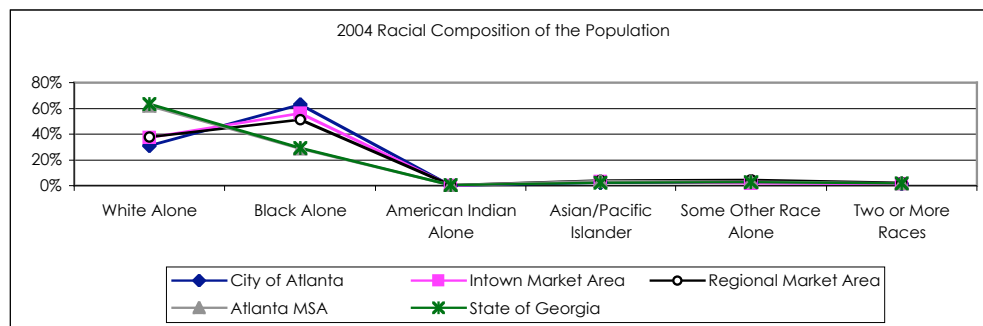
### Racial Composition

- The 2004 estimated racial distribution for the Intown and Regional Market Areas reveal a racially and ethnically diverse population. An estimated 56% and 51%, respectively, of Intown and Regional Market Area residents are black or African-American, 37% and 38% are white, 3% and 4% are Asian/Pacific Islander and 3% and 7% are categorized within “other” racial groups (Exhibit EC-4). The racial distribution of city resembles the Intown and Regional Market Areas: 63%, 31%, 2% and 4%, respectively.
- The racial distribution of the MSA and state populations are similar to each other but differ significantly from the close-in population. Within the MSA, an estimated 62% of the population is white, 29% is black or African-American, 4% is Asian/Pacific and 5% fall into “other” racial or ethnic groups. Statewide, the distribution is 63%, 29%, 3% and 5%, respectively.

Exhibit EC-4

RACIAL COMPOSITION  
City of Atlanta, Intown Market Area, Regional Market Area, Atlanta MSA and State of Georgia  
2004

Race	City of Atlanta	Intown Market Area	Regional Market Area	Atlanta MSA	State of Georgia
White Alone	31.2%	37.4%	37.5%	62.1%	63.4%
Black Alone	62.9%	56.1%	51.4%	28.9%	29.4%
American Indian Alone	0.2%	0.2%	0.3%	0.3%	0.3%
Asian/Pacific Islander	2.0%	3.2%	4.1%	3.6%	2.5%
Some Other Race Alone	2.4%	1.6%	4.6%	3.3%	2.9%
Two or More Races	1.3%	1.5%	2.1%	1.8%	1.6%
Total	434,771	157,106	1,424,666	4,857,497	9,052,085
Hispanic (any race)	5.3%	4.0%	10.1%	7.7%	6.5%



Source: ESRI BIS

### Community Tapestry Segments

- Recognizing that people who share the same demographic characteristics may have widely divergent desires and preferences, Community Tapestry data (developed by ESRI Business Information



Solutions) categorizes neighborhoods throughout the nation into 65 consumer groups or market segments. Neighborhoods are geographically defined by census blocks, which are analyzed and sorted by a variety of demographic and socioeconomic characteristics as well as other determinants of consumer behavior. Based on this information, neighborhoods are classified as one of 65 market segments.

- Intown and Regional Market Area households have been grouped into Community Tapestry market segments, which show a division among the populations of the two areas. Almost one-half (43%) of Intown Market Area households are grouped in the *Metro Renters* market segment, which can be generally described as young, upwardly mobile professionals who lead active lifestyles. While the remaining 57% of Intown Market Area households fall into market segments with distinct characteristics and preferences, the overall population is generally more urban than the Regional Market Area population. In terms of how these groups spend their money, young professional households generally center their purchases on themselves (entertainment, apparel, electronics, sports gear) while less affluent households focus their purchases on necessities but splurge on items such as discounted designer apparel. Within the Regional Market Area, households are generally more diverse in terms of age, income, household size and preferences. Representative of the Atlanta region, both market areas are predominantly young.
- Market segments that comprise at least 5% of total households in the Intown and Regional Market Areas are summarized below. Primary market segments are arranged alphabetically as they account for different shares of total households in the two geographic areas. Exhibit EC-6 follows, which shows the housing preferences and socioeconomic rankings of the all market segments within both geographic areas.

Exhibit EC-5

SUMMARY CHARACTERISTICS OF PRIMARY MARKET SEGMENTS  
Intown and Regional Market Area Households

Market Segment	Socioeconomic	Residential	Preferences
<b>Aspiring Young Families</b> <ul style="list-style-type: none"><li>• Intown Market Area Households: 0%</li><li>• Regional Market Area Households: 6%</li></ul>	<ul style="list-style-type: none"><li>• Young families, married couples or single parents.</li><li>• Ethnically diverse.</li><li>• Average income.</li><li>• Work mostly in service, sales, administration and government jobs.</li></ul>	<ul style="list-style-type: none"><li>• Approximately one-half have purchased single family detached and attached townhouses, valued slightly below the national average.</li><li>• If renting, rents are typically slightly below average.</li></ul>	<ul style="list-style-type: none"><li>• Buy big-ticket home furnishing items and electronics.</li><li>• With kids, likely to purchase baby and children's products and toys.</li><li>• Like dancing, going to the movies, working out at the gym, kickboxing and attending pro basketball games.</li><li>• Dine out at family restaurants.</li></ul>

Market Segment	Socioeconomic	Residential	Preferences
<b>City Commons</b> <ul style="list-style-type: none"> <li>Intown Market Area Households: 10%</li> <li>Regional Market Area Households: 4%</li> </ul>	<ul style="list-style-type: none"> <li>Young singles, with and without young children.</li> <li>Predominantly black/African American.</li> <li>Low income – many receive public assistance.</li> <li>Many are unemployed.</li> <li>Among those who work, typically have service jobs.</li> </ul>	<ul style="list-style-type: none"> <li>Likely to rent in mid-rise buildings.</li> </ul>	<ul style="list-style-type: none"> <li>Infant and children's food and clothing are primary purchases.</li> <li>Also buy women's designer jeans, doll clothes and videos.</li> <li>Enjoy going to the movies, practicing martial arts and attending pro basketball games.</li> <li>Shop at T.J. Maxx and Lane Bryant.</li> </ul>
<b>Family Foundations</b> <ul style="list-style-type: none"> <li>Intown Market Area Households: 1%</li> <li>Regional Market Area Households: 5%</li> </ul>	<ul style="list-style-type: none"> <li>Family households, with a mix of married couples, single parents, grandparents and young adult children.</li> <li>Moderate incomes.</li> <li>Slightly older.</li> <li>Predominantly black/African American.</li> </ul>	<ul style="list-style-type: none"> <li>Live in attached and detached single family homes, valued below the national average.</li> <li>Stable neighborhoods.</li> </ul>	<ul style="list-style-type: none"> <li>Spend money on home improvement projects, small appliances and women's clothing.</li> <li>Enjoy watching TV, martial arts/kickboxing and basketball.</li> <li>Health conscious.</li> <li>Shop at Lerner's, Lane Bryant, Lord &amp; Taylor and Belk.</li> </ul>
<b>Inner City Tenants</b> <ul style="list-style-type: none"> <li>Intown Market Area Households: 6%</li> <li>Regional Market Area Households: 6%</li> </ul>	<ul style="list-style-type: none"> <li>Young, multicultural households.</li> <li>Singles and single parents.</li> <li>Not highly educated.</li> <li>Below average incomes generated from service and unskilled labor jobs.</li> </ul>	<ul style="list-style-type: none"> <li>Usually rent in mid-rise and high-rise buildings.</li> </ul>	<ul style="list-style-type: none"> <li>Much of their income is devoted to infant and children's products.</li> <li>Enjoy going to the movies, watching TV, shopping and attending basketball and football games.</li> </ul>
<b>Laptops and Lattes</b> <ul style="list-style-type: none"> <li>Intown Market Area Households: 12%</li> <li>Regional Market Area Households: 5%</li> </ul>	<ul style="list-style-type: none"> <li>Single, affluent and highly educated.</li> <li>Work in professional and managerial jobs.</li> <li>Slightly older.</li> <li>Predominantly white.</li> </ul>	<ul style="list-style-type: none"> <li>Live alone or with a roommate – average household size is 1.82 persons.</li> <li>Despite high incomes, only one-third own their homes.</li> <li>If homeowners, homes are valued at almost four times the national average.</li> </ul>	<ul style="list-style-type: none"> <li>Active and health/socially conscious: go to the gym, buy organic products, travel and shop.</li> <li>Buy sporting gear.</li> <li>Frequently purchase off the Internet.</li> <li>Enjoy concerts, sporting events and museums.</li> <li>Shop at Banana Republic, Nordstrom and Macy's.</li> </ul>
<b>Metro City Edge</b> <ul style="list-style-type: none"> <li>Intown Market Area Households: 1.5%</li> <li>Regional Market Area Households: 5%</li> </ul>	<ul style="list-style-type: none"> <li>Young with below average incomes.</li> <li>Almost one-half have children, often headed by a single parent.</li> <li>Unemployment is high.</li> </ul>	<ul style="list-style-type: none"> <li>Usually live in single family detached homes.</li> <li>Rental and ownership are almost evenly split.</li> </ul>	<ul style="list-style-type: none"> <li>Buy baby food and supplies, children's clothing and toys.</li> <li>Play basketball and football and enjoy going to the movies.</li> <li>Eat out at fast food restaurants.</li> <li>Shop at Lerner's, Lane Bryant and T.J. Maxx.</li> </ul>



Market Segment	Socioeconomic	Residential	Preferences
<b>Metro Renters</b> <ul style="list-style-type: none"> <li>Intown Market Area Households: 43%</li> <li>Regional Market Area Households: 12%</li> </ul>	<ul style="list-style-type: none"> <li>Young, well educated professionals that are just starting out on their own.</li> <li>Nearly one-third are in their twenties.</li> <li>Incomes are slightly above average and climbing.</li> </ul>	<ul style="list-style-type: none"> <li>Likely to rent in high-rise buildings.</li> <li>High rents may force them to have roommates.</li> <li>Live in ethnically diverse neighborhoods.</li> </ul>	<ul style="list-style-type: none"> <li>A young market, expenditures are primarily devoted to themselves: ski/workout clothing, designer apparel, organic food, travel and imported wine/beer.</li> <li>Go to concerts, movies and dancing and enjoy yoga, skiing and jogging.</li> <li>Shop online.</li> <li>Favorite stores are Bloomingdales, Banana Republic, Macy's and Gap.</li> </ul>
<b>Modest Income Homes</b> <ul style="list-style-type: none"> <li>Intown Market Area Households: 11%</li> <li>Regional Market Area Households: 3%</li> </ul>	<ul style="list-style-type: none"> <li>High concentration of single parents and older families with no kids.</li> <li>Low income.</li> <li>Work in service sector jobs.</li> </ul>	<ul style="list-style-type: none"> <li>Typically own their home, valued far below the national average.</li> </ul>	<ul style="list-style-type: none"> <li>Buy men's designer jeans and own one television set.</li> <li>Shop at Lane Bryant and Wal-Mart.</li> <li>Purchases are typically limited to necessities.</li> </ul>
<b>Young and the Restless</b> <ul style="list-style-type: none"> <li>Intown Market Area Households: 0.4%</li> <li>Regional Market Area Households: 11%</li> </ul>	<ul style="list-style-type: none"> <li>Young and on the go.</li> <li>Single person and shared households.</li> <li>Moderate incomes.</li> <li>Work in service and professional management occupations.</li> </ul>	<ul style="list-style-type: none"> <li>Due to their youth, high turnover.</li> <li>Approximately three quarters are renters.</li> <li>Rents and home values are in line with the national average.</li> </ul>	<ul style="list-style-type: none"> <li>Purchases center on themselves: sports clothing/gear, designer clothing and computers/software.</li> <li>Enjoy movies, concerts, fast food and bar/grilles.</li> <li>Use storage facilities.</li> <li>Shop at Banana Republic and Express.</li> </ul>

Source: ESRI BIS

HOUSEHOLDS BY LIFEMODE GROUP AND MARKET SEGMENT  
Intown and Regional Market Areas  
2004

LifeMode Group/Segment	Intown Market Area		Regional Market Area		Housing Type	Household Type	Percent Living in Owner-Occupied Units	Median Age	Median Income as a Percent of US	Median Net Worth as a Percent of US
	Number	Percent of HHS	Number	Percent of HHS						
High Society	1,648	2.4%	44,092	7.8%						
Top Rung	539	0.8%	11,419	2.0%	Single Family	Married Couples	91%	43.3	361%	415%
Suburban Splendor	0	0.0%	1,983	0.4%	Single Family	Married Couples	93%	40.0	239%	229%
Connoisseurs	1,109	1.6%	13,458	2.4%	Single Family	Married Couples	91%	44.5	246%	280%
Boomburbs	0	0.0%	1,275	0.2%	Single Family	Married Couples	91%	34.0	203%	167%
Wealthy Seaboard Suburbs	0	0.0%	5,652	1.0%	Single Family	Married Couples	89%	41.5	187%	197%
Sophisticated Squires	0	0.0%	7,573	1.3%	Single Family	Married Couples	91%	36.8	168%	160%
Exurbanites	0	0.0%	2,732	0.5%	Single Family	Married Couples	90%	42.9	169%	191%
Upscale Avenues	893	1.3%	58,469	10.4%						
Urban Chic	421	0.6%	9,943	1.8%	Single/Multi-Unit	Family Mix	67%	41.2	173%	222%
Pleasant-Ville	0	0.0%	739	0.1%	Single Family	Married Couples	85%	38.8	148%	145%
In Style	0	0.0%	11,581	2.1%	Single/Multi-Unit	Married Couples	71%	37.6	139%	143%
<b>Enterprising Professionals</b>	472	0.7%	<b>26,211</b>	<b>4.6%</b>	Single/Multi-Unit	Family Mix	45%	32.5	133%	98%
Cozy and Comfortable	0	0.0%	9,995	1.8%	Single Family	Married Couples	87%	40.2	126%	117%
Metropolis	9,436	14.0%	67,494	12.0%						
Metropolitans	722	1.1%	19,438	3.4%	Single/Multi-Unit	Mixed HHS	60%	37.2	114%	109%
City Strivers	382	0.6%	2,426	0.4%	Multi-Unit	Family Mix	34%	31.9	76%	97%
<b>Metro City Edge</b>	1,030	1.5%	<b>29,595</b>	<b>5.2%</b>	Single/Multi-Unit	Single Parent/Married	54%	28.5	64%	61%
<b>Modest Income Homes</b>	<b>7,302</b>	<b>10.8%</b>	16,035	2.8%	Single Family	Family Mix	51%	34.2	43%	60%
Solo Acts	38,983	57.8%	178,540	31.7%						
<b>Laptops and Lattes</b>	<b>8,346</b>	<b>12.4%</b>	<b>28,332</b>	<b>5.0%</b>	Multi-Unit	Single Person/Shared	38%	38.0	179%	235%
Trendsetters	380	0.6%	12,905	2.3%	Multi-Unit	Single Person/Shared	30%	34.8	111%	116%
<b>Metro Renters</b>	<b>28,664</b>	<b>42.5%</b>	<b>66,699</b>	<b>11.8%</b>	Multi-Unit	Single Person	21%	34.1	101%	100%
Old and Newcomers	1,300	1.9%	8,481	1.5%	Single/Multi-Unit	Single Person/Shared	38%	36.2	85%	96%
<b>Young and Restless</b>	293	0.4%	<b>62,123</b>	<b>11.0%</b>	Multi-Unit	Single Person/Shared	15%	29.1	82%	67%
Senior Lifestyles	2,768	4.1%	21,438	3.8%						
Prosperous Empty Nesters	0	0.0%	5,725	1.0%	Single Family	Married Couples	86%	46.1	138%	173%
Rustbelt Retirees	0	0.0%	1,238	0.2%	Single Family	Married Couples	83%	43.2	96%	104%
Retirement Communities	64	0.1%	8,677	1.5%	Single/Multi-Unit	Single/Married	55%	49.5	96%	188%
Simple Living	142	0.2%	2,052	0.4%	Single/Multi-Unit	Mixed HHS	43%	39.5	56%	86%
Social Security Set	2,562	3.8%	3,746	0.7%	High Rise	Single Person	14%	43.9	32%	73%
Scholars & Patriots	2,026	3.0%	3,270	0.6%						
Military Proximity	0	0.0%	65	0.0%	TH/Multi-Unit	Married w/ Children	7%	22.2	80%	75%
College Towns	920	1.4%	1,918	0.3%	Single/Multi-Unit	Single Person/Shared	30%	24.3	59%	37%
Dorms to Diplomas	1,106	1.6%	1,287	0.2%	Multi-Unit	Single Person/Shared	10%	21.7	36%	15%
High Hopes	196	0.3%	41,463	7.4%						
<b>Aspiring Young Families</b>	0	0.0%	<b>32,110</b>	<b>5.7%</b>	Single/Multi-Unit	Family Mix	48%	29.8	96%	77%
Great Expectations	196	0.3%	9,353	1.7%	Single/Multi-Unit	Family Mix	48%	33.0	73%	72%
Global Roots	3,762	5.6%	56,656	10.0%						
International Marketplace	0	0.0%	8,230	1.5%	Single/Multi-Unit	Family Mix	31%	30.6	86%	92%
Industrious Urban Fringe	0	0.0%	3,505	0.6%	Single Family	Married Couples	66%	28.6	82%	71%
<b>Inner City Tenants</b>	<b>3,762</b>	<b>5.6%</b>	<b>34,356</b>	<b>6.1%</b>	Multi-Unit	Family Mix	20%	27.9	61%	57%
NeWest Residents	0	0.0%	5,115	0.9%	Multi-Unit	Family Mix	17%	25.5	55%	57%
City Dimensions	0	0.0%	5,450	1.0%	Single/Multi-Unit	Family Mix	34%	28.8	53%	56%
Family Portrait	6,974	10.3%	43,237	7.7%						
Up and Coming Families	0	0.0%	3,366	0.6%	Single Family	Married w/ Children	86%	32.0	139%	84%
Milk and Cookies	0	0.0%	17,499	3.1%	Single Family	Married w/ Children	81%	32.7	119%	93%
<b>City Commons</b>	<b>6,974</b>	<b>10.3%</b>	<b>22,372</b>	<b>4.0%</b>	Multi-Unit	Single Parent/Single	20%	24.0	32%	42%
Traditional Living	767	1.1%	46,308	8.2%						
Main Street, USA	0	0.0%	7,335	1.3%	Single/Multi-Unit	Family Mix	63%	35.9	103%	104%
Rustbelt Traditions	0	0.0%	8,611	1.5%	Single Family	Family Mix	74%	36.1	89%	85%
Midlife Junction	0	0.0%	470	0.1%	Single/Multi-Unit	Family Mix	66%	40.1	90%	107%
<b>Family Foundations</b>	767	1.1%	<b>29,892</b>	<b>5.3%</b>	Single Family	Family Mix	76%	37.4	87%	93%
Factories & Farms	0	0.0%	1,247	0.2%						
Home Town	0	0.0%	1,247	0.2%	Single Family	Family Mix	58%	33.6	60%	62%
American Quilt	0	0.0%	1,619	0.3%						
Crossroads	0	0.0%	1,619	0.3%	Single/Mobile	Family Mix	75%	31.9	77%	57%
Total	67,453	100.0%	563,833	100.0%						

Note: Market segments in bold account for 4% or more of total households in the Intown or Regional Market Area.

Source: ERSI BIS

### Employment Trends

- Despite improved economic growth nationwide, employment continues to suffer. Coined a “job loss” recovery, nationwide employment has decreased by 1.3% in the past two years translating into 1.7 million jobs lost. Net job gains, albeit slight, are just beginning to take hold. Limited venture capital, professional and white-collar job outsourcing, increased productivity and uncertainty have all contributed to job losses. The Selig Center at the University of Georgia predicts that employment will improve slightly in 2004.
- While Georgia was among the first and hardest hit states by the recession, it has been among the first showing signs of recovery. The Selig Center predicts that in 2004 and 2005, Georgia’s economic growth will outpace growth nationwide, being among the top states in the nation in terms of job growth.
- Much of the state’s job growth will be concentrated in the Atlanta MSA. More than 76% of new jobs created in the state will be in the Atlanta MSA, down from 90% in 2003. An estimated 46,100 jobs will be added to the MSA’s employment base, representing a 2.1% increase, above a 1.5% increase statewide. Strong projected employment growth in the Atlanta MSA is largely attributed to a high number of service-producing jobs and few manufacturing and government jobs. While employment growth in the Atlanta MSA will be impeded by losses in the construction sector in 2004, the MSA remains an excellent choice for businesses to locate due to Hartsfield International Airport (the second busiest passenger airport in the world), a large pool of educated and talented workers, a diversified economy, several renowned academic institutions, continued, albeit slower, population growth and an excellent transportation system (e.g., interstate system, rail, transit, etc.).
- Within the study area, there are an estimated 471 businesses that employ 6,733 workers (Exhibit EC-7 on the following page). A large share of study area jobs (39%) are concentrated in the services sector, followed by the wholesale trade (15%), retail trade (14%) and government sectors. The ratio of employees (“daytime population”) to residents (“nighttime population”) is 1.36, indicating a stronger commercial than residential base.
- Major employers in the study area include: Mead Packaging (manufactures cartons for soft drinks and beer); Georgia Power; Fulton County Jail; ADM (distributors of food products); and Greyhound. Other employers include the Vanderplay Company (paper recycling), Universal Foods (formerly Better Brands) and as shown in Exhibit EC-7, wholesale, manufacturing, retail and service jobs. At this time, there are no indications that any of the large employers are leaving the study area.
- Exhibit EC-8 (which follows EC-7) illustrates the differences in the types of jobs immediately surrounding the study area and those further away (e.g., Midtown). Within a one-mile radius of the study area, wholesale trade accounts for 45% of jobs, while the services sector generates only 18% of jobs.

Exhibit EC-7

EXISTING BUSINESS MIX AND EMPLOYMENT  
Study Area

Industry	Businesses		Employees	
	#	%	#	%
Agriculture & Mining	4	0.8%	25	0.4%
Construction	20	4.2%	353	5.2%
Manufacturing	28	5.9%	574	8.5%
Transportation	12	2.5%	182	2.7%
Communication	4	0.8%	158	2.3%
Utilities	1	0.2%	4	0.1%
Wholesale Trade	37	7.9%	1,008	15.0%
Finance, Insurance & Real Estate	26	5.5%	94	1.4%
Retail Trade				
Home Improvement	7	1.5%	38	0.6%
General Merchandise	0	0.0%	0	0.0%
Food Stores	10	2.1%	34	0.5%
Auto Dealers & Gas Stations	14	3.0%	63	0.9%
Apparel & Accessories	4	0.8%	23	0.3%
Furniture & Home Furnishings	17	3.6%	208	3.1%
Eating & Drinking Establishments	22	4.7%	308	4.6%
Miscellaneous Retail	26	5.5%	240	3.6%
Subtotal	100	21.2%	914	13.6%
Services				
Hotels and Lodging	1	0.2%	27	0.4%
Automotive Services	33	7.0%	116	1.7%
Motion Picture & Amusement	14	3.0%	57	0.8%
Health	7	1.5%	68	1.0%
Legal	4	0.8%	7	0.1%
Education & Libraries	7	1.5%	830	12.3%
Other Services	157	33.3%	1,500	22.3%
Subtotal	223	47.3%	2,605	38.7%
Government	12	2.5%	809	12.0%
Other	4	0.8%	7	0.1%
<b>Total</b>	<b>471</b>	<b>100%</b>	<b>6,733</b>	<b>100%</b>
Daytime/Nighttime	1.36 Persons			

Source: ESRI BIS

- Service jobs account for the largest share of total employment within the two- and three-mile areas (48% and 43% respectively), with business, legal and engineering/account research/management service jobs accounting for the largest share of employment within the services sector. Government and retail trade sectors also account for a significant share of total employment within the two- and three-mile areas.
- The high number of employees within a one-, two- and three-mile area speaks well for future redevelopment activity in the study area as nearby employees are a valuable market for new retail and housing development. More than 15,000 people work within one mile of the study

area; more than 145,000 people work within two miles; and almost 236,000 work within three miles of the study area.

EXHIBIT EC-8

BUSINESSES AND EMPLOYMENT WITHIN A 1-MILE, 2-MILE AND 3-MILE RADIUS FROM THE STUDY AREA  
Second Quarter 2004

Industry	1-Mile Radius				2-Mile Radius				3-Mile Radius			
	Businesses		Employees		Businesses		Employees		Businesses		Employees	
	#	%	#	%	#	%	#	%	#	%	#	%
Agriculture & Mining	2	0.3%	7	0.0%	37	0.6%	674	0.5%	65	0.6%	867	0.4%
Construction	27	4.0%	458	3.0%	156	2.4%	2,128	1.5%	289	2.6%	3,519	1.5%
Manufacturing	59	8.8%	1,198	7.8%	347	5.3%	9,490	6.5%	511	4.6%	13,852	5.9%
Transportation, Communication, Utilities	23	3.4%	913	6.0%	166	2.5%	14,734	10.1%	312	2.8%	19,129	8.1%
Wholesale Trade	46	6.9%	6,983	45.7%	474	7.3%	10,593	7.3%	630	5.7%	15,063	6.4%
Finance, Insurance & Real Estate	42	6.3%	220	1.4%	582	8.9%	11,966	8.2%	932	8.4%	14,918	6.3%
Retail Trade												
Home Improvement & Mobile Homes	11	1.6%	79	0.5%	38	0.6%	827	0.6%	65	0.6%	1,524	0.6%
General Merchandise	0	0.0%	0	0.0%	6	0.1%	75	0.1%	25	0.2%	258	0.1%
Food Stores	12	1.8%	59	0.4%	77	1.2%	741	0.5%	175	1.6%	1,886	0.8%
Auto Dealers & Gas Stations	13	1.9%	87	0.6%	47	0.7%	287	0.2%	90	0.8%	568	0.2%
Apparel & Accessories	5	0.7%	24	0.2%	121	1.9%	677	0.5%	243	2.2%	1,382	0.6%
Furniture & Home Furnishings	35	5.2%	390	2.6%	140	2.1%	1,206	0.8%	241	2.2%	1,909	0.8%
Eating & Drinking Establishments	32	4.8%	597	3.9%	405	6.2%	7,470	5.1%	703	6.3%	12,667	5.4%
Miscellaneous Retail	44	6.6%	449	2.9%	300	4.6%	2,233	1.5%	548	4.9%	3,813	1.6%
Subtotal	152	22.7%	1,685	11.0%	1,134	17.4%	13,516	9.3%	2,090	18.8%	24,007	10.2%
Services												
Personal	20	3.0%	72	0.5%	214	3.3%	961	0.7%	468	4.2%	2,280	1.0%
Business	78	11.6%	962	6.3%	562	8.6%	10,854	7.5%	862	7.8%	13,183	5.6%
Automotive Repair, Services, Parking	43	6.4%	179	1.2%	166	2.5%	1,090	0.7%	237	2.1%	1,500	0.6%
Miscellaneous Repair Services	7	1.0%	51	0.3%	35	0.5%	181	0.1%	69	0.6%	308	0.1%
Motion Picture	9	1.3%	51	0.3%	43	0.7%	248	0.2%	75	0.7%	504	0.2%
Amusement & Recreation	13	1.9%	99	0.6%	104	1.6%	7,061	4.8%	197	1.8%	7,961	3.4%
Health	12	1.8%	116	0.8%	297	4.6%	5,637	3.9%	671	6.0%	19,028	8.1%
Legal	8	1.2%	19	0.1%	838	12.9%	11,070	7.6%	950	8.6%	11,431	4.8%
Education	10	1.5%	329	2.2%	77	1.2%	7,943	5.5%	143	1.3%	13,594	5.8%
Social	12	1.8%	170	1.1%	125	1.9%	2,212	1.5%	278	2.5%	5,355	2.3%
Museums, Art Galleries, Botanical, Zoo	2	0.3%	16	0.1%	12	0.2%	771	0.5%	20	0.2%	862	0.4%
Membership Organizations	47	7.0%	294	1.9%	235	3.6%	2,289	1.6%	442	4.0%	3,651	1.5%
Engineering, Accounting, Research, Mang't	35	5.2%	371	2.4%	453	7.0%	12,009	8.2%	649	5.9%	14,259	6.0%
Hotels and Lodging	1	0.1%	8	0.1%	47	0.7%	7,068	4.9%	62	0.6%	7,312	3.1%
Misc. Services	2	0.3%	33	0.2%	11	0.2%	55	0.0%	17	0.2%	79	0.0%
Subtotal	299	44.6%	2,770	18.1%	3,219	49.4%	69,449	47.7%	5,140	46.3%	101,307	42.9%
Public Administration	16	2.4%	1,020	6.7%	323	5.0%	12,546	8.6%	1,021	9.2%	42,549	18.0%
NonClassifiable Establishments	5	0.7%	28	0.2%	76	1.2%	540	0.4%	104	0.9%	704	0.3%
Total	671	100%	15,282	100%	6,514	100%	145,636	100%	11,094	100%	235,915	100%

Source: Claritas 2003

## RETAIL OVERVIEW

- Retail spending contributed significantly to the U.S. economy during the 2001 recession and the 2002-2003 jobless recovery and is expected to remain strong over the next year. Low interest rates have played a key role in supporting retail sales by increasing the disposable income of borrowers and facilitating new housing construction that has, consequently, boosted the demand for grocery-anchored shopping centers. Rising fuel costs and a potential jump in interest rates will, hopefully, be offset by greater buying power ensuing from anticipated job growth.
- Despite difficult economic conditions in recent years, Atlanta's retail market remained relatively strong. Atlanta's strong population growth and in-migration, robust residential development and strong economy lay the groundwork for a healthy retail market. Marcus & Millichap, a real estate investment brokerage company, expects vacancy rates to drop to 9.0% by year-end with growing sales improving demand for space in 2005. Marcus & Millichap believe that the arrival of new retail space is unlikely to boost vacancy rates, as much of the new space has already been pre-leased. Vacancy rates at community and neighborhood centers declined slightly in 2004, from 8.5% to 8.0%, with no major changes anticipated in the near-term. Average asking rents are expected to increase to \$16.62 per square foot, with the greatest increases in Midtown where asking rents will range from \$25-\$30 per square foot.
- Regional mall construction has been a major component of Atlanta's retail market in recent years. Discover Mills in Gwinnett County and Stonecrest in DeKalb County added 2.5 million square feet of retail space to the local market. However, a shift in consumer preferences are forcing developers to consider retail formats other than enclosed malls and strip development. Open-air power centers, town centers with grid systems and neighborhood business districts that enable customers to park a few steps from their destination are growing in popularity. Also, malls that offer entertainment venues are attracting more customers than those with traditional tenant mixes. Taubman Centers has cancelled plans to develop a mall north of the city near Georgia 400 and CBL Associates has changed its plans to develop a regional mall in Henry County to a smaller open-air project.
- Atlantic Station is one of the most significant retail projects in the Atlanta area slated for delivery in 2005 and is an example of the growing interest in mixed-use retail formats. Less than one mile from the study area, Atlantic Station is a 138-acre environmental redevelopment and reclamation project that essentially acts as a gateway to the Upper Westside. Once completed, the project will offer 12 million square feet of office, retail, restaurant and hotel space. Phase I is expected to be complete in the summer of 2005 and will entail 800,000 square feet of retail, after which time an additional 900,000 square feet of space is planned (a total of 1.7 million square feet). Retail anchors at Atlantic

Station will include a 366,000 square foot IKEA, Dillards, Publix and a wide variety of national retailers.

- Phase One of M West, a 186-unit loft/townhouse development in the northwestern quadrant of the study area, will include 10,500 square feet of retail space in two buildings along Marietta Boulevard. Construction is expected to be complete in the first quarter of 2005 and space has not yet been leased.
- BrockBuilt – a major residential developer in the area – is planning to develop 30,000 square feet of retail at the intersection of Bolton and Marietta, just south of Parkview. Construction on one of the three 10,000 square foot buildings is expected to be at the end of 2004. Brockbuilt anticipates strong demand for retail due to active nearby residential development.
- Within the study area, two recently developed apartment projects include retail. M Street Apartments, which began leasing apartment units in March 2004, is currently seeking tenants to occupy approximately 8,500 square feet of retail space; none of the space has been leased. Asking lease rates are \$19.50 NNN and the types of tenants the leasing agent hopes to attract range from a neighborhood bar/grille to a dry cleaner to a clothing boutique. 1016 Lofts (formerly Alta West) was completed in 2003 and includes approximately 5,500 square feet of retail space. Lease rates at 1016 Lofts \$18.00 NNN to \$24.00 NNN and one space (1,700 square feet) remains vacant. A trendy noodle house (The Real Chow Baby) is a major tenant.
- The following summarizes convenience and destination retail development within the study area:

#### ***Convenience Retail***

The Upper Westside study area has no major convenience shopping centers. However, there are two grocery-anchored shopping centers located just north of the study area on Howell Mill Road: Howell Mill Square and Howell Mill Village. Convenience shopping is augmented by small centers or freestanding businesses throughout the study area. Some of these businesses appear to be marginal.

Howell Mill Square is located on Howell Mill Road just south of I-75. The center has 88,502 square feet and is anchored by a Kroger store. Eating and drinking businesses include Picadilly (out parcel), Arbys (out parcel), El Amigo restaurant, Subway, Great Panda Chinese restaurant, Pizza and Great Western Burrito. Other businesses include a Nearly New shop, hair salon, nails, alterations, Verizon and a chiropractor. The center has a 2% vacancy rate.

Howell Mill Village is located north of I-75 at Collier Road. The center has 98,549 square feet anchored by Save-Rite, Blockbuster and Eckerd Drugs. Other tenants include a sub shop, Homespun Café, Sports Bar, Stooges, Pizza, Melting Pot Restaurant, sushi and Ripples Ice Cream. Service businesses include UPS, nails, hair, tanning, clock repair, dry cleaner,

chiropractor, dentist and insurance. There is also a clothing boutique and educational materials. The Beer Mug, a restaurant, is the sole vacancy in this center. Per square foot rate is \$13/NNN.

In addition, a Super Walmart is planned just north of the study area, a Publix center will be located in Atlantic Station and a new Kroger center is planned at the southern tip of the study area on Northside Drive.

#### ***Destination Retail***

The Upper Westside is becoming a home furnishing/decorating center, drawing shoppers from throughout the metropolitan area. The large industrial buildings available in the study area are highly suitable for furniture showrooms, discount warehouses and quasi-retail users. Typically, these users are looking for spaces from 2,000 to 5,000 square feet.

Westside Urban Market, which serves as a center for this type of retail, is located at the intersection of Huff Road and Howell Mill Road. Businesses located in this 25,000 square foot center would be classified as "high end specialty" and include the Silk Trading Company, Bungalow and the Curtain Exchange. Lease rates are \$25.00/N per square foot. These types of unique businesses (e.g., garden artifacts, antiques, fabrics, rugs) also extend to the west along Huff Road.

Several popular restaurants are located in the Howell Mill Road/Huff Road area, including Bacchanalia and Taqueria del Sol.



## OFFICE-INDUSTRIAL MARKET OVERVIEW

- The Upper Westside study area is centered within the much larger Chattahoochee Industrial district, which has historically acted as a warehouse/distribution and light-manufacturing center with companies that service downtown businesses and the convention industry. Service companies that have traditionally leased space in the area have been hesitant to lease large warehouse space due to concern over the economy. However, the market for smaller spaces (i.e., 5,000 square feet and less) within the Chattahoochee Industrial District continues to be high. Nearby, the Fulton Industrial district provides an alternative for large-scale warehousing and distribution.
- Second quarter 2004 market statistics (Dorey's Atlanta Industrial Guide) for the Chattahoochee Industrial district reveal the following:

	Distribution Space	Warehouse Space	Service Space
<b>Total Space (Sq. Ft.)</b>	9,600,000	2,500,000	3,400,000
<b>Vacancy</b>	26%	7%	19%
<b>Rental Rate Range</b>	\$5.32 - \$5.58	\$2.36	\$6.72 - \$6.97
<b>Under C</b>	None	None	None

- Despite the soft leasing market, the growing popularity of the area is pushing sales prices higher – as much as \$60 per square foot but typically in \$20-\$40 square foot range. While there still remain some older industrial buildings offering users relatively low rental rates and purchase prices, the land is becoming too expensive to allow for profitable warehouse/distribution development. Clearly, developers, businesses and investors are increasingly recognizing the appeal of the Upper Westside (e.g., accessibility, competitive pricing, new developments, etc.).
- One of the main strengths of the Chattahoochee Industrial District is location. Proximity to I-75/I-85 provides this market with easy access to all parts of Atlanta and to the metro area's extensive transportation infrastructure. Proximity to downtown allows many convention service-related businesses to use the area's industrial facilities as launching points for meetings at the Georgia World Congress Center and the Georgia Dome.
- Much of the space along the major roads – Ellsworth Industrial Boulevard, Chattahoochee Avenue, Howell Mill Road and Huff Road – is being converted to higher land uses, particularly retail (e.g., home furnishings/accessories, luggage, apparel) and service/retail. Existing warehouse/distribution uses on back roads may continue to be used as such, at least in the near-term.
- The following summarizes major office/industrial projects within the study area:

### ***King Plow***

Opening in the early 1990s, the King Plow Center essentially paved the way for arts-related adaptive reuse projects in the Upper Westside study area and is the foundation upon which the area emerged as an arts district. A former plow equipment factory, this 65,000 square foot adaptive reuse project is located on West Marietta Street. The King Plow Arts Center houses over 65 tenants, primarily commercial, fine and performing arts-related businesses ranging from graphic design to photography to theater.

### ***Puritan Mill***

Currently with 100% occupancy, Puritan Mill has been a successful office development, leasing within one year of opening in 2002 to 90-95%. The project's rapid absorption in a soft office market is attributed to its competitive pricing and unique, architectural details.

Formerly a soap manufacturing plant, Puritan Mill was redeveloped as office space in 2002 with tenants that included BrightHouse, the Atlanta Police Department's Professional Standards Division and Eclipse Hair Studio. Portions of the site were designated as a Brownfield, encumbering the redevelopment process. Puritan Mill offers approximately 92,000 square feet of office space, which includes a 15,000 square foot former foundry that can be rented for special events and meetings. Current tenants include a significant proportion of "creatives" such as media businesses, graphic designers, public relations businesses as well as the Upper Chattahoochee Riverkeeper.

Generally, rental rates are \$14.50 per square foot with \$3.50 per square foot for taxes, insurance and CAM. Tenants pay their own utilities.

### ***Northyards Business Park***

Northyards is an urban business park centered around the redevelopment of the Railroad Roundhouse, a servicing station built in 1911. The non-traditional office park, located just west of the Coca Cola world headquarters on North Avenue, currently has 275,000 square feet in six buildings. The site has approximately 50 acres available in three- to ten-acre sites. Overall, the site can accommodate between 750,000 and 1,000,000 square feet.

Initial targeting of this project was at large users such as call centers and telecommunications companies. Currently, tenants include Bauder Business College (65,000 square feet) and an architectural firm.

### ***Midtown West***

Bounded by Howell Mill Road, Marietta Street, Brady Avenue and Tenth Street, the Midtown West project is a 13-acre mixed-use development comprised of 17 buildings that total approximately 375,000 square feet. The Brickworks – a 138,000 space at 972-1000 Marietta Street – is now breaking ground and will offer retail, entertainment and commercial uses. Anticipated delivery of space for occupancy will begin in August 2005 with lease rates of \$10-\$25 per square foot. Among the buildings currently

available for lease, rates range from \$3-\$4.50 for office/warehouse to \$12-\$20 for showroom/office.

### ***Metro Nexus***

In 2000, Metro Nexus purchased the former Sears Distribution Center and began an \$80 million renovation of the structure. Today, the 1 million square foot facility is for sale. Advantis Real Estate is leasing the space to telecom and industrial users but the future of the facility is in question.

- As mentioned above, today, there is significant demand derived from small users in the study area looking for 2,500 to 3,500 square feet of space. There are 20,000 to 30,000 square foot buildings planned by Selig Enterprises on Chattahoochee Avenue, which will market to 2,500 to 5,000 square foot quasi-retail tenants. There is an increase in leasing activity at Logan Circle including a 30,000 square foot lease.
- Improvement of the infrastructure in the study area will facilitate new office-industrial development. Specifically, road improvements are needed, including the widening of roads to facilitate trucking and car access.

## RESIDENTIAL PROFILE

### National Trends

- New home sales exceeded the million-unit mark for the first time in 2003 at approximately 1.5 million units, with even further gains predicted for 2004. Improved job growth, a rise in incomes, growth in new household formations (partially fueled by immigration) and moderate interest rates should help maintain a strong single family market through the remainder of 2004 and 2005. Low interest rates have had a direct impact on homeownership rates, as renters are finding that mortgage payments are increasingly comparable to rents – especially in the entry-level market.
- The nation's apartment market has been weakened by job losses, a national "home buying-spree" and the fact that out-of-work young professionals have had to move back home with their parents. As employment improves, apartment demand should push upward. Although rising employment and interest rates should strengthen the rental market, an oversupply of units due to high completions in recent years will subdue the recovery. Marcus & Millichap anticipate that by year-end, vacancy rates will drop to 6.5% and asking rent will increase by 1.5% with an even greater jump in effective rent due to fewer concessions.
- Unlike other metropolitan areas throughout the nation where soaring housing prices have been unrelated to income – creating a bubble – home prices in Atlanta have generally kept pace with incomes. The average home sales price in Atlanta was \$193,885 in the second quarter of 2004, up 4.7% from the same time period in 2003. Over the past five years, homes prices in Atlanta rose 31%, compared to 42% nationwide. Strong development activity necessitated by growing demand contributed to restrained price increases: Atlanta continues to lead the nation in single family permitting activity.

### Local Housing Characteristics

In an effort to enhance the housing profile of the Residential Market Area (i.e., the six-minute drive area), selected housing data for the study area, the Residential Market Area and the City of Atlanta are provided as follows:

- Occupied housing units in the Residential Market Area are almost evenly divided among ownership and rental: an estimated 48% are owner occupied and 52% are renter occupied compared to 44% and 56% in the city, respectively. In 2000, only 23% of occupied housing units in the study area were owner occupied.
- The estimated average value of specified owner occupied units in the Residential Market Area is \$237,600, below \$291,050 citywide. Estimated median values are closer: \$157,940 in the Residential Market Area and \$166,135 citywide. While the average home value of selected housing units in the study area in 2000 was \$133,929, new housing is generally priced from the high \$100,000s to the low \$200,000s.

- In 2000, median contract rent (i.e., the amount of rent agreed to or contracted for, regardless of additional services, furnishings and utilities) ranged from as low as \$288 in the study area to \$518 in the City of Atlanta to \$633 in the Residential Market Area.
- Indicative of urban areas, only one-half of occupied units in the Residential Market Area (53%) and the City of Atlanta (49%) are single family units, far below 71% throughout the MSA. With a high proportion of renters (77%) in the study area in 2000, it is not surprising that in 2000 only 36% of occupied units were single family attached or detached units.
- Prior to 2000 and the surge in redevelopment activity, the study area's limited supply of residential units was generally older, with a median year built of 1957. Residential units in the city and the Residential Market Area are relatively newer: 1962 and 1971, respectively. The rapid expansion of the MSA in the past few decades is demonstrated by the fact that median year built of units throughout the MSA was 1982 in 2000.

#### **Competitive For Sale Market**

- Not surprising, sales of entry-level homes in Atlanta (priced below \$250,000) have remained strong. Higher priced homes (especially those priced above \$400,000) are staying on the market longer as the market continues to show weakness at this price point. Uncertainty over job security and the economy is deterring move-up buyers and even encouraging some homeowners to move-down. Homebuyers can still secure reasonably priced homes in the region's ever-expanding suburbs, while intown and close-in neighborhood prices are within reach of a narrowing few. Recent signs of job growth in the Atlanta region will undoubtedly help the housing market, particularly the \$400,000-plus market.
- Atlanta's condominium market has strengthened significantly in recent years, particularly in intown markets south of Buckhead and close-in neighborhoods that surround downtown. The Metropolis – a 20-floor, 492-unit high rise in Midtown – demonstrated the potential of the Atlanta condominium market. With reasonable price points (under \$200,000 initially), a central location and solid amenity package, the project sold out in only six months. Factors underlying the resurgence of the condominium market in Atlanta include:
  - A demographic shift derived from the growth in the aging baby boomer and early retiree markets. Members of these groups are seeking active lifestyles in smaller, maintenance free, secure housing.
  - As housing prices rise, condominiums are relatively more affordable than single family detached housing. This is especially appealing to young professional/first time homebuyers who want to build equity and enjoy the tax benefits of home ownership.
  - A national shift in demand favoring intown or close-in housing.
  - As interest rates fall, renters realize that rents are exceeding potential mortgage payments.

- The success of the Metropolis and other intown condominium projects is fueling development activity. The following large-scale condominium projects within and close to the Upper Westside study area are currently in the predevelopment or construction phase:

#### ***LeCraw Development***

Following the success of M Street Apartments, Julian LeCraw is developing 123-condominiums and three commercial condominiums directly across the street on Marietta Street. The project is expected to break ground the beginning of 2005 and be completed in early 2006. The units will be small (an average of 950 square feet and 80% one bedroom) to keep prices in the \$160,000 to \$290,000 range, which the developer believes is needed in the market.

#### ***Atlantic Station***

The Lane Company is building 347 upscale condominium units at Atlantic Station, priced from the \$150,000s to the \$330,000s. All but two have sold. Buyers are typically young couples and singles but families with children, empty nesters and parents of college students are also proving to be a viable market.

The Novare Group broke ground on TWELVE Atlantic Station in September 2004, which is expected to be complete in October 2005. This 26-story luxury hotel/condominium project will offer 101 hotel rooms and 404 condominium units. Studios and one-bedroom will be priced from \$190,000 and two-bedrooms from \$270,000. Novare is reporting that they are receiving interest from outside of the state.

#### ***Spire***

The developers of the Metropolis are building a 28-story, 393-unit condominium project in Midtown on Peachtree Street at the site of a former motel. Although the sales center will not open until November, the developer is reporting a good deal of interest from its Internet site.

#### ***The Plaza Midtown***

Selig Enterprises plans to build two 20-story towers with 452 condominium units and 70,000 square feet of retail, dining and entertainment space on 8<sup>th</sup> Street between Spring Street and West Peachtree Street. A 33,600 square foot Publix will occupy approximately one-half of the retail space. One- and two-bedroom units will start at \$180,000. Phase one units are expected to be delivered the first quarter of 2006.

#### ***European American Reality***

A 19-story tower next to the Federal Reserve on 11<sup>th</sup> Street and West Peachtree will offer 280 condominium units priced from the mid \$100,000s to the mid \$300,000s.

#### ***Centennial Park***

Similar to their project TWELVE Atlantic Station, Novare will begin construction on TWELVE Centennial Hill at the end of 2004. This two-tower project (1,018 condominium units, 100 hotel rooms) will also offer 25,000 square feet of retail/restaurant space.

- Conversion of smaller, historic buildings to condominium/loft units in intown communities such as Castleberry Hill, Old Fourth Ward, Grant Park, Inman Park and Marietta Street have also proved successful. Unique architectural details (high ceilings, exposed brick and oversized industrial windows), reasonable prices and association fees and an intown location are factors that have led to the success of this residential format.
- Apart from condominium development, the intown single family market is continuing to prosper. Established suburban developers (e.g., John Wieland Homes, Beazer Homes) are now looking to intown neighborhoods for development opportunities as homebuyers increasingly want to be close to jobs, entertainment and part of a community. Due to hard-to-assemble and higher priced land, higher density attached product is often the key to successful intown single family development. Within the study area, land/housing prices have reportedly doubled and even tripled in the past decade.
- The following provides summaries of recently completed or ongoing single family developments within or close to the study area.

#### ***M West***

Construction is underway on a 186-unit loft/townhome project on Elaine Avenue between Marietta Street and Ellsworth Industrial Boulevard. Contemporary designed units will range from about \$200,000 to about \$330,000, with the majority of units available (two-bedroom, two-bath units with two-car garages) for less than \$250,000. Unit size ranges from roughly 1,200-1,800 square feet, with the larger hilltop models offering views of the city. Contemporary designed units will have concrete and carpeted/hardwood floors. The developer is reporting strong interest in the project thus far with an average monthly absorption of seven units per month. The first phase of the development will also include 10,500 square feet of retail space in two buildings along Marietta Boulevard. Community amenities include a fitness center, swimming pool and two small parks and will tie into the conservation area.

#### ***BrockBuilt***

Formerly Perry Homes, West Highlands is located a short drive west from the study area on Herman Perry Boulevard. Once complete, West Highlands will include more than 2,000 mixed-income rental and for-sale attached and detached units (1,000 single family homes, 780 apartment units and 134 senior units). BrockBuilt is a major partner in the West Highlands redevelopment project, developing affordable and market rate single family homes. At West Highlands, BrockBuilt plans to build more than 1,000 single family homes ranging in price from \$179,000 to \$400,000-plus. Initially prices will start in the \$200,000s and rise as the project is completed over the next seven years. The first phase of construction will include homes starting at \$149,000, reserved for buyers with household incomes below the metro median. Other BrockBuilt communities close to the study area include:

1. *Parkview*  
Off Bolton and Marietta



62 units  
1920's architecture, front porches, 2-car garage and gourmet kitchens  
\$260,000s to \$330,000s  
62 sold in 18 months

2. *Adams Crossing*  
South of Bolton and west of Marietta  
3 years old  
161 units; sold 85 in 2 years  
\$220,000s originally: resales \$330,000s
3. *Dupont Commons*  
Marietta Road, off Bolton  
225 units  
24 are under construction: 8 have sold in 2 months  
Starting in the \$270,000s

#### **Atlantic Station**

Beazer Homes has built 56 townhouses priced from the \$270,000s to the \$330,000s at Atlantic Station, all of which have sold. Beazer plans to develop 34 attached single family homes in the next six months as well as begin construction on an additional 150 units.

#### **Woodbery & Weaver**

Woodbery & Weaver hope to begin development of a 77-unit condominium project within the next year. The unnamed project will have underground parking and will offer one- and two-level units. The property is located in the study area at Howell Mill Road and 10<sup>th</sup> Street.

#### **Competitive Rental Market**

- Similar to the national apartment market, the Atlanta area has been hard hit by recent job losses and low interest rates. Anticipated job gains in the MSA combined, hopefully, with continued restraint on the part of developers will help the rental market regain its footing in 2004-2005. By year-end, asking rents are expected to increase modestly by 1% to an average of \$806 per month and vacancy rates down slightly to 10.8%. There appears to be some level of consensus that the worst is over in the apartment market. Developers are showing the greatest interest in intown and close-in submarkets.
- Within the study area, two major rental apartment communities have been developed in the past two years. 1016 Lofts (formerly Alta West) is a 265-unit luxury mid-rise project completed in 2003 and is currently 96% occupied. Just a few blocks to the south, M Street Apartments (308-units) began leasing in March 2004 and is currently 50% occupied (an average monthly absorption on 26 units).
- To obtain an understanding of rents, unit sizes, occupancies, community/unit amenities of rental apartment projects in the Upper Westside area, Marketek conducted a survey of 16 nearby apartment projects in October 2004, presented in Exhibit EC-9 on the following page.

## Exhibit EC-9

## SUMMARY CHARACTERISTICS OF SELECTED APARTMENT COMMUNITIES

Site	Units/ Mix	Market Rent		Square Feet		Rent/ Sq. Foot	Structure Type	Occ Rate	Year Built	Amenities												Comments
		Low	High	Low	High					A	B/P	C	CA	FC	I	L	P	S	WD	WDC		
1 Park District Atlantic Station One Bedroom Two Bedroom	231	\$1,115 \$1,435	\$1,430 \$2,115	775 1,002	998 1,449	\$1.44 \$1.45	4-story TH	NA	2004	X	X	X	X	X	X	X		X		Began leasing in May. Expected complete in Nov. Business center, concierge serv. Initial lease-up phase.		
2 West 14th Street Lofts One Bedroom Two Bedroom Three Bedroom Four Bedroom	40	\$650 \$1,000 \$1,200 \$1,500	\$1,000 \$1,300 \$1,500 \$2,500	500 1,000 1,300 1,500	1,000 1,300 1,500 4,000	\$1.10 \$1.00 \$0.96 \$0.73	Adaptive Reuse Former Warehouse	80%	1991			X							X	Live/work adaptive reuse but mainly professionals, often creatives.		
3 1016 Lofts (Alta West) Studio One Bedroom Two Bedroom	265	\$875 \$975 \$1,150	\$880 \$1,380 \$1,525	630 720 972	649 1,404 1,560	\$1.37 \$1.11 \$1.06	Midrise Flats & Live/Work	96%	2003	X	X	X	X	X	X		X	X	X	Mostly young professionals - creatives - and students. Formerly Alta West.		
4 M Street Apartments Studio One Bedroom Two Bedroom Three Bedroom	308	\$740 \$965 \$1,140 \$1,370	\$765 \$1,120 \$1,555 \$1,430	561 831 955 1,275	561 992 1,527 1,292	\$1.34 \$1.14 \$1.09 \$1.09	4-story Flats and TH	51%	2004		X	X	X	X	X	X	X			Initial lease-up phase. Young professionals & students. Three bedroom units leased first. Average of 26 units/month. 20% affordable set aside.		
5 Intown Lofts & Apartments One Bedroom Two Bedroom	75	\$770 \$1,190	\$1,290 \$1,390	730 985	1,000 1,260	\$1.19 \$1.15	Loft TH & Flats	87%	2002	X	X	X	X	X	X	X			X	Intown, Legacy and Stonewall have opened in the past two years. Intown and Stonewall "loft" character while Legacy offers more traditional layout.		
6 Legacy Lofts One Bedroom Two Bedroom	18	\$1,250 \$1,300	\$1,575 \$1,755	1,035 1,200	1,300 1,380	\$1.21 \$1.18	Loft TH & Flats	89%	2002	X	X	X		X		X	X		X	Tenants are mostly AU students and young, single professionals. Guarded/secured/unground parking, shared facilities.		
7 Stonewall Apartments One Bedroom Two Bedroom Three Bedroom	38	\$841 \$1,198 \$2,228	\$1,195 \$1,495 \$2,228	650 1,200 1,500	1,030 1,400 1,500	\$1.21 \$1.04 \$1.49	Loft TH & Flats	60%	2004	X	X	X		X		X	X		X	Initial lease-up phase. An average of 8 units/month at Stonewall (August 2004).		
8 Savannah Midtown One Bedroom Two Bedroom	322	\$900 \$1,300	\$1,280 \$1,799	747 1,204	964 1,342	\$1.27 \$1.22	Mid-rise	90%	2002	X	X	x	x	X			x		X	Rooftop basketball & Mostly young professional. 17 units/month absorption.		
9 Cityview One Bedroom Two Bedroom	202	\$970 \$1,300	\$1,260 \$1,650	693 965	904 1,304	\$1.40 \$1.30	Mid-rise with loft level	94%	2004		X			X			X		X	Controlled access, meditation center. Preleased 15 apts. Will offer 56 condos, 3 of which		
10 Highland Ridge One Bedroom Two Bedroom	217	\$650 \$1,075	\$840 \$1,075	450 1,000	830 1,000	\$1.16 \$1.08	2- & 3-story townhome	100%	1984		X	X		X			X		X	Mix of families, students and young professionals.		
11 Alexan Terrace Studio One Bedroom Two Bedroom	330	\$833 \$1,100 \$1,300	\$1,000 \$1,600 \$2,400	610 762 1,122	718 1,417 2,465	\$1.38 \$1.24 \$1.03	Mid-rise flats & TH	86%	2003	X	X	X	X	X	X			X		X	Biz center, controlled access. Mostly intown professionals and students.	

Site	Units/ Mix	Market Rent		Square Feet		Rent/ Sq. Foot	Structure Type	Occ Rate	Year Built	Amenities												Comments
		Low	High	Low	High					A	B/P	C	CA	FC	I	L	P	S	WD	WDC		
12 Studioplex Studio One Bedroom Two Bedroom	112	\$950 \$790 \$950	\$1,200 \$1,000 \$1,050	950 790 950	1,200 1,000 1,050	\$1.00 \$1.00 \$1.00	2-story flats	98%	1999	X   	X   	X   	X   	   	   	X   	   	   	   	   	Mixed-use historic building, 1st story retail, courtyard. Residents are mostly age 25-40, frequently artists.	
13 Village at Castleberry One Bedroom Two Bedroom Three Bedroom	450	\$820 \$950 \$1,375	\$795 \$1,325 \$1,375	710 890 1,138	799 1,188 1,138	\$1.07 \$1.09 \$1.21	2- & 3-story townhome	94%	1999	X   	X   	X   	x   	X   	   	X   	X   	X   	   	Students and professionals. 40/20/40*.		
14 Magnolia Park One Bedroom Two Bedroom Three Bedroom	400	\$740 \$895 \$1,030	\$785 \$950 \$1,085	600 870 1,080	710 955 1,290	\$1.16 \$1.01 \$0.89	2- & 3-story townhomes	95%	1999	X   	X   	X   	X   	X   	   	X   	   	X   	   	Controlled access, tennis. 40/20/40*.		
15 Highland Walk Studio One Bedroom Two Bedroom	350	\$800 \$850 \$1,200	\$950 \$1,230 \$1,500	600 600 870	710 710 955	\$1.34 \$1.59 \$1.48	Midrise Flats	86%	2003	X   	X   	X   	X   	X   	X   	X   	X   	X   	   	Still in the initial lease-up phase. Move-in started in Fall of 2003.		
16 1660 Peachtree One Bedroom Two Bedroom	355	\$919 \$1,315	\$1,005 \$1,430	779 1,164	807 1,288	\$1.21 \$1.12	Midrise Flats	93%	1999	X  	X  	X  	X  	X  	X  	  	X  	X  	X  	Business center. Single and married professionals, some with children.		
TOTAL Studio One Bedroom Two Bedroom Three Bedroom Four Bedroom	3,713	\$899 \$1,034 \$1,344 \$1,482 \$2,000	     	719 851 1,180 1,301 2,750	     	\$1.25 \$1.21 \$1.14 \$1.14 \$0.73	     	92%	2000.4													

A: Intrusion Alarm  
B/P: Balcony/Patio  
C: Cable Ready

CA: Controlled Access  
FC: Fitness Center  
I: High Speed Internet Available

L: Laundry Room on Site  
P: Pool  
S: Extra Storage Available

TH: Townhouse  
WD: Washer & Dryer  
WDC: Washer & Dryer Connections

Note: Average occupancy rates exclude projects in the initial lease-up phase (M Street Apartments, Stonewall Apartments and Park District Station). Projects in bold are located in the study area.

\* Denotes ratio of units that are reserved for public housing, tax credit and market rate, respectively.

Source: Marketek, Inc. October 2004

- The 16 projects surveyed include a total of 3,713 units. The average occupancy rate of the projects surveyed is 92%, which does not include projects in their initial lease-up phase. Only four of the projects surveyed are 95% or more occupied. An occupancy rate of 95% or higher indicates that demand and supply are close to equilibrium.
- The apartment communities surveyed are generally newly developed. The average age (weighted) of all projects surveyed is only four years.
- Average value ratios (i.e., rents per square foot) among the projects surveyed range from \$1.14-\$1.25 for studios, one-, two- and three-bedroom units. Not surprising, newly developed projects (e.g., Atlantic Station, M Street Apartments, Highland Walk) typically command the highest rents per square foot.
- Six of the projects surveyed are located in the study area, two of which (M Street Apartments and Stonewall Apartments) are in initial lease-up. 1016 Lofts (formerly Alta Vista) was completed in 2003 and recently sold to Archstone Development. Archstone's interest in the property was reportedly largely influenced by tax incentives provided from the project's location in a housing Enterprise Zone. 1016 Lofts is 96% occupied and tenants are a generally a mix of professionals, students and "creatives." M Street Apartments began leasing in March and has achieved an average monthly absorption of 26 units. H.J. Russell has built three projects in the study area on Northside Drive since 2002 (Intown Lofts, Legacy Lofts and Stonewall Apartments), which are attracting AU Center Students and young professionals. Accounting for initial lease-up at Stonewall, occupancy rates at the Russell properties are only moderately strong.
- West 14<sup>th</sup> Street Lofts is an adaptive reuse project located in the study area. Several of the units are live/work, attracting professionals (reportedly creative occupations). The project is presently only 80% occupied, most likely due to minimal project and community amenities.
- Unit features and project amenities present in the communities surveyed generally include full kitchen with dishwasher, balcony or patio, secured parking, fitness center, cable and high speed Internet ready, pool and on-site laundry and or/washer/dryer connection. Upgrade features and amenities include: washer/dryer in unit, tennis, dry cleaning pickup/drop off, business center, extra storage, car wash area, gourmet kitchens, concrete floors, yoga/Pilates center and concierge services.
- Renter profiles obtained from interviews with managers and on-site leasing agents confirm that while there is a mix of prospective tenants at the communities surveyed, tenants are typically young professionals and students. Managers and on-site leasing agents repeatedly noted a strong demand for two-bedroom units.

## RETAIL MARKET POTENTIAL

Establishing the study area's position as a commercial center for neighborhood, Intown and Regional Market Area residents as well as other key target markets (e.g., area employees and students at neighboring institutions) is a central part of the Upper Westside's revitalization program. This section provides estimates of potential market demand for retail uses in the Intown and Regional Market as well as the study area's capture of this demand

### Retail Sales Potential and Supportable Space

- The methodology for estimating statistical market support for retail space in the Intown and Regional Market Areas is displayed in Exhibits RD-2 through RD-6. This methodology applies expenditure potential<sup>1</sup> by type of merchandise to market area population figures in order to obtain potential sales volume for market area residents. Potential sales are divided among six merchandise and service categories: *shoppers goods, convenience goods, food & beverages, automotive products, personal services and other retail expenditures*. Exhibit RD-1 specifies the types of goods and services within several of these categories. For instance, "apparel" includes women's apparel, men's apparel, children's apparel, footwear, watches and jewelry.

Exhibit RD-1

SUMMARY OF MERCHANDISE AND SERVICE CATEGORIES

Merchandise/Service Category	Types of Goods/Services
Apparel	Women's Apparel, Men's Apparel, Children's, Footwear, Watches & Jewelry
Home Furnishings	Furniture, Floor Coverings, Major and Small Appliances, Household Textiles, Floor Coverings, PC Software and Hardware, Housewares, Dinnerware, Telephones
Home Improvement	Maintenance and Remodeling Materials, Lawn & Garden
Misc. Specialty Retail	Pet Care, Books & Periodicals, Sporting Equipment, Toys & Hobbies, Video Cassettes & Games, TV/VCR/Cameras, Audio Equipment, Luggage, Eyeglasses
Groceries	Food at Home, Nonalcoholic Beverages at Home, Alcoholic Beverages, Smoking Products
Restaurants	Food Away From Home, Alcoholic Beverages
Entertainment	Admission to Movie/Theater/Opera/Ballet, Recreational Lessons, Participation in Clubs
Personal Services	Shoe Repair, Video Rental, Laundry & Dry Cleaning, Alterations, Clothing Rental & Storage, Watch & Jewelry Repair, Photo Processing & Supplies, Child Care

Source: ESRI BIS

- Estimates of sales per square foot of store space derived from the Urban Land Institute's *Dollars and Cents of Shopping Centers* are used to convert adjusted potential sales to supportable space estimates. In Exhibit RD-2, for example, in the case of apparel, potential sales of \$235,073,705 in the Intown Market Area at sales per square foot of \$209 will support 1,124,755 square feet devoted to this type of merchandise. Potential sales of \$2,070,394,776 in the Regional Market Area will support 9,906,195 square feet of apparel space.
- Exhibit RD-2 shows that in 2004, there is the potential for approximately 6.2 million square feet of retail space based on potential expenditures of residents who reside in the Intown Market Area. In the Regional Market Area there was the potential for 55.4 million square feet of retail space based on resident expenditure potential. That is, Regional Market Area residents have the potential to generate sales demand that will support 55.4 million square feet of retail space, 6.2 million square feet of which is located in the Intown Market Area. However, these potential expenditures by residents may occur outside of the Intown or Regional Market Areas – including the Internet – if desirable goods and services are not available.

Exhibit RD-2

RETAIL EXPENDITURE POTENTIAL  
Intown and Regional Market Areas  
2004

Merchandise or Service Category	Per Household Expenditure		Potential Sales Volume		*Target Sales (\$/SF)	Potential Supportable Space (SF)	
	Intown Area	Regional Area	Intown Area	Regional Area		Intown Area	Regional Area
Apparel	\$3,485	\$3,672	\$235,073,705	\$2,070,394,776	\$209	1,124,755	9,906,195
Home Furnishings	\$1,560	\$1,795	\$105,226,680	\$1,012,080,235	\$199	503,477	5,085,830
Home Improvement	\$621	\$729	\$41,888,313	\$411,034,257	\$140	299,202	2,935,959
Misc. Specialty Retail	\$2,333	\$2,501	\$157,367,849	\$1,410,146,333	\$216	728,555	6,528,455
<b>Shoppers Goods</b>			<b>\$539,556,547</b>	<b>\$4,903,655,601</b>		<b>2,655,989</b>	<b>24,456,440</b>
Grocery	\$7,588	\$7,942	\$511,833,364	\$4,477,961,686	\$390	1,312,393	11,481,953
Health & Personal Care	\$1,090	\$1,169	\$73,523,770	\$659,120,777	\$365	201,435	1,805,810
<b>Convenience Goods</b>			<b>\$585,357,134</b>	<b>\$5,137,082,463</b>		<b>1,513,828</b>	<b>13,287,763</b>
<b>Restaurants</b>	\$4,469	\$4,688	<b>\$301,447,457</b>	<b>\$2,643,249,104</b>	\$263	<b>1,146,188</b>	<b>10,050,377</b>
<b>Entertainment</b>	\$445	\$479	<b>\$30,016,585</b>	<b>\$270,076,007</b>	\$90	<b>333,518</b>	<b>3,000,845</b>
<b>Personal Services</b>	\$1,150	\$1,226	<b>\$77,570,950</b>	<b>\$691,259,258</b>	\$151	<b>513,715</b>	<b>4,577,876</b>
<b>Total</b>			<b>\$1,533,948,673</b>	<b>\$13,645,322,433</b>		<b>6,163,237</b>	<b>55,373,300</b>

\* Target sales are based on the Urban Land Institute, "Dollars and Cents of Shopping Centers."

Sources: ESRI BIS; Urban Land Institute; Marketek, Inc.

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- Exhibit RD-3 on the following page displays projected retail expenditure potential for the Intown and Regional Market Areas for the year 2009. Based on population growth and subsequent increases in retail sales for the years 2004-2009, total supportable retail space in the Regional Market Area will have increased to 60.2 million square feet by the year 2009, 6.7 million square feet of which is generated by Intown Market Area residents.

<sup>1</sup> Consumer spending is estimated from the Bureau of Labor Statistics' Consumer Expenditure (CEX) Surveys. The CEX surveys have been used for over a century to provide data to study consumer spending and its effect on gross domestic product.

## Exhibit RD-3

RETAIL EXPENDITURE POTENTIAL  
Intown and Regional Market Areas  
2009

Merchandise or Service Category	Per Household Expenditure		Potential Sales Volume		*Target Sales (\$/SF)	Potential Supportable Space (SF)	
	Intown Area	Regional Area	Intown Area	Regional Area		Intown Area	Regional Area
Apparel	\$3,485	\$3,672	\$255,924,460	\$2,251,710,792	\$209	1,224,519	10,773,736
Home Furnishings	\$1,560	\$1,795	\$114,560,160	\$1,100,713,745	\$199	575,679	5,531,225
Home Improvement	\$621	\$729	\$45,603,756	\$447,030,819	\$140	325,741	3,193,077
Misc. Specialty Retail	\$2,333	\$2,501	\$171,326,188	\$1,533,640,711	\$216	793,177	7,100,188
<b>Shoppers Goods</b>			<b>\$587,414,564</b>	<b>\$5,333,096,067</b>		<b>2,919,116</b>	<b>26,598,226</b>
Grocery	\$7,588	\$7,942	\$557,232,368	\$4,870,121,762	\$390	1,428,801	12,487,492
Health & Personal Care	\$1,090	\$1,169	\$80,045,240	\$716,843,659	\$365	219,302	1,963,955
<b>Convenience Goods</b>			<b>\$637,277,608</b>	<b>\$5,586,965,421</b>		<b>1,648,103</b>	<b>14,451,447</b>
<b>Restaurants</b>	\$4,469	\$4,688	<b>\$328,185,484</b>	<b>\$2,874,733,168</b>	\$263	<b>1,247,854</b>	<b>10,930,544</b>
<b>Entertainment</b>	\$445	\$479	<b>\$32,679,020</b>	<b>\$293,728,069</b>	\$90	<b>363,100</b>	<b>3,263,645</b>
<b>Personal Services</b>	\$1,150	\$1,226	<b>\$84,451,400</b>	<b>\$751,796,686</b>	\$151	<b>559,281</b>	<b>4,978,786</b>
<b>Total</b>			<b>\$1,670,008,076</b>	<b>\$14,840,319,411</b>		<b>6,737,454</b>	<b>60,222,649</b>

\* Target sales are based on the Urban Land Institute, "Dollars and Cents of Shopping Centers."

Sources: ESRI BIS; Urban Land Institute; Marketek, Inc.

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## Exhibit RD-4

RETAIL EXPENDITURE POTENTIAL  
Intown and Regional Market Areas  
2014

Merchandise or Service Category	Per Household Expenditure		Potential Sales Volume		*Target Sales (\$/SF)	Potential Supportable Space (SF)	
	Intown Area	Regional Area	Intown Area	Regional Area		Intown Area	Regional Area
Apparel	\$3,485	\$3,672	\$278,625,750	\$2,448,904,536	\$209	1,333,138	11,717,247
Home Furnishings	\$1,560	\$1,795	\$124,722,000	\$1,197,108,835	\$199	626,744	6,015,622
Home Improvement	\$621	\$729	\$49,648,950	\$486,179,577	\$140	354,635	3,472,711
Misc. Specialty Retail	\$2,333	\$2,501	\$186,523,350	\$1,667,949,413	\$216	863,534	7,721,988
<b>Shoppers Goods</b>			<b>\$639,520,050</b>	<b>\$5,800,142,361</b>		<b>3,178,051</b>	<b>28,927,568</b>
Grocery	\$7,588	\$7,942	\$606,660,600	\$5,296,623,046	\$390	1,555,540	13,581,085
Health & Personal Care	\$1,090	\$1,169	\$87,145,500	\$779,621,297	\$365	238,755	2,135,949
<b>Convenience Goods</b>			<b>\$693,806,100</b>	<b>\$6,076,244,343</b>		<b>1,794,295</b>	<b>15,717,033</b>
<b>Restaurants</b>	\$4,469	\$4,688	<b>\$357,296,550</b>	<b>\$3,126,488,144</b>	\$263	<b>1,358,542</b>	<b>11,887,788</b>
<b>Entertainment</b>	\$445	\$479	<b>\$35,577,750</b>	<b>\$319,451,327</b>	\$90	<b>395,308</b>	<b>3,549,459</b>
<b>Personal Services</b>	\$1,150	\$1,226	<b>\$91,942,500</b>	<b>\$817,635,338</b>	\$151	<b>608,891</b>	<b>5,414,804</b>
<b>Total</b>			<b>\$1,818,142,950</b>	<b>\$16,139,961,513</b>		<b>7,335,087</b>	<b>65,496,652</b>

\* Target sales are based on the Urban Land Institute, "Dollars and Cents of Shopping Centers."

Sources: ESRI BIS; Urban Land Institute; Marketek, Inc.

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- Exhibit RD-4 on the previous page provides the same type of analysis for the year 2014 when supportable space will have increased to approximately 65.5 million square feet in the Regional Market Area; 7.3 million square feet of which is located in the Intown Market Area.
- Exhibits RD-5 and RD-6 on the following pages distribute increases in sales and supportable retail space in the Intown and Regional Market Areas among various retail categories for the years 2004, 2009 and 2014. Exhibits RD-5 and RD-6 also provide an estimate of the study area's capture of the increase in potential sales and demand for space for the years 2009 and for 2014.
- Based on this analysis, sales by Regional Market Area retailers of selected *shoppers goods* have a potential to reach \$4.9 billion in 2004, \$5.3 billion by 2009 and \$5.8 billion by 2014. In 2004, this sales level would support 24.5 million square feet devoted to *shoppers goods*. By 2009, supportable space for *shoppers goods* is projected to reach 26.6 million square feet of space and by 2014, supportable space will potentially have increased to 28.9 million square feet. Estimated retail expenditures by Intown Market Area residents will support approximately one-quarter of this space in 2009 and 2014.
- Utilizing the assumption that the majority of space devoted to *shoppers goods* will continue to be concentrated in major shopping centers and commercial strip developments located in the Intown and Regional Market Areas, the study area's projected capture of the potential increase in total Intown and Regional Market Area demand for *shoppers goods* during the study period 2004-2014 is conservative. The projection shows that the study area has the potential to capture 10% of the increase in total sales generated by Intown Market Area residents by 2009 and 4% of the increase in Regional Market Area potential sales. By 2014, Exhibits RD-5 and RD-6 show these capture rates increasing to 12% and 6%, respectively. The study area's capture rates for *shoppers goods* and other retail categories are primarily based on Marketek's experience in similar shopping districts throughout the nation (i.e., the proportion of sales comparable shopping districts have been able to capture), the study area's current retail potential relative to the market area and the study area's competitive advantages once redeveloped.
- Based on these capture rates, the study area has the potential of drawing an additional \$17.2 million in *shoppers goods* sales by 2009 and \$28.0 million by 2014 from Regional Market Area residents. These increases in sales translate into 91,410 square feet of supportable retail space by 2009 and an additional 149,123 square feet by 2014. In 2009, 28% of the estimated demand for *shoppers goods* space will result from expenditures by Intown Market Area residents, dropping to 22% by 2014 as the study area draws more customers from beyond a six-minute drive. Examples of *shoppers goods* that would appeal to the key target markets include: home furnishings and accessories, trendy apparel, architectural antiques, gardening supplies, card/stationery/gifts, pet supplies and art galleries.

Exhibit RD-5

POTENTIAL SUPPORTABLE RETAIL SPACE  
Intown Market Area  
2004-2014

Merchandise or Service Category	2004	2009			2014			Total Study Area Capture
	Intown Market Area	Intown Market Area	Numeric Increase	Study Area Capture	Intown Market Area	Numeric Increase	Study Area Capture	
<b>Shoppers Goods</b>								
Apparel				10%			12%	
Potential Sales	\$235,073,705	\$255,924,460	\$20,850,755	\$957,160	\$278,625,750	\$22,701,290	\$1,250,532	\$2,207,692
Supportable SF	1,124,755	1,224,519	99,764	4,580	1,333,138	108,619	5,983	10,563
Home Furnishings								
Potential Sales	\$105,226,680	\$114,560,160	\$9,333,480	\$1,914,321	\$124,722,000	\$10,161,840	\$2,501,063	\$4,415,384
Supportable SF	503,477	575,679	72,202	9,620	626,744	51,065	12,568	22,188
Home Improvement								
Potential Sales	\$41,888,313	\$45,603,756	\$3,715,443	\$957,160	\$49,648,950	\$4,045,194	\$1,250,532	\$2,207,692
Supportable SF	299,202	325,741	26,539	6,837	354,635	28,894	8,932	15,769
Misc. Retail								
Potential Sales	\$157,367,849	\$171,326,188	\$13,958,339	\$957,160	\$186,523,350	\$15,197,162	\$1,250,532	\$2,207,692
Supportable SF	728,555	793,177	64,622	4,431	863,534	70,357	5,789	10,221
<b>Total</b>								
Potential Sales	\$539,556,547	\$587,414,564	\$47,858,017	\$4,785,802	\$639,520,050	\$52,105,486	\$6,252,658	\$11,038,460
Supportable SF	2,655,989	2,919,116	263,127	25,468	3,178,051	258,935	33,273	58,741
<b>Convenience Goods</b>								
Grocery				12%			14%	
Potential Sales	\$511,833,364	\$557,232,368	\$45,399,004	\$5,447,880	\$606,660,600	\$49,428,232	\$6,919,952	\$12,367,833
Supportable SF	1,312,393	1,428,801	116,408	13,969	1,555,540	126,739	17,743	31,712
Health & Personal Care								
Potential Sales	\$73,523,770	\$80,045,240	\$6,521,470	\$782,576	\$87,145,500	\$7,100,260	\$994,036	\$1,776,613
Supportable SF	201,435	219,302	17,867	2,144	238,755	19,453	2,723	4,867
<b>Total</b>								
Potential Sales	\$585,357,134	\$637,277,608	\$51,920,474	\$6,230,457	\$693,806,100	\$56,528,492	\$7,913,989	\$14,144,446
Supportable SF	1,513,828	1,648,103	134,275	16,113	1,794,295	146,192	20,467	36,580
<b>Restaurants</b>								
Potential Sales	\$301,447,457	\$328,185,484	\$26,738,027	\$3,743,324	\$357,296,550	\$29,111,066	\$4,657,771	\$8,401,094
Supportable SF	1,146,188	1,247,854	101,666	14,233	1,358,542	110,688	17,710	31,943
<b>Entertainment</b>								
Potential Sales	\$30,016,585	\$32,679,020	\$2,662,435	\$346,117	\$35,577,750	\$2,898,730	\$434,810	\$780,926
Supportable SF	333,518	363,100	29,583	3,846	395,308	32,208	4,831	8,677
<b>Personal Services</b>								
Potential Sales	\$77,570,950	\$84,451,400	\$6,880,450	\$894,459	\$91,942,500	\$7,491,100	\$1,123,665	\$2,018,124
Supportable SF	513,715	559,281	45,566	5,924	608,891	49,610	7,441	13,365
<b>Total</b>								
Potential Sales	\$1,533,948,673	\$1,670,008,076	\$136,059,403	\$16,000,157	\$1,818,142,950	\$148,134,874	\$20,382,892	\$36,383,050
Supportable SF	6,163,237	6,737,454	574,216	65,583	7,335,087	597,633	83,723	149,306

Sources: ESRI BIS; Urban Land Institute; Marketek, Inc.

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Exhibit RD-6  
POTENTIAL SUPPORTABLE RETAIL SPACE  
Regional Market Area  
2004-2014

Merchandise or Service Category	2004	2009			2014			Total Study Area Capture
	Regional Market Area	Regional Market Area	Numeric Increase	Study Area Capture	Regional Market Area	Numeric Increase	Study Area Capture	
<i>Shoppers Goods</i>								
Apparel				4%			6%	
Potential Sales	\$2,070,394,776	\$2,251,710,792	\$181,316,016	\$3,435,524	\$2,448,904,536	\$197,193,744	\$5,604,556	\$9,040,079
Supportable SF	9,906,195	10,773,736	867,541	16,438	11,717,247	943,511	26,816	43,254
Home Furnishings								
Potential Sales	\$1,012,080,235	\$1,100,713,745	\$88,633,510	\$6,871,047	\$1,197,108,835	\$96,395,090	\$11,209,111	\$18,080,159
Supportable SF	5,085,830	5,531,225	445,395	34,528	6,015,622	484,397	56,327	90,855
Home Improvement								
Potential Sales	\$411,034,257	\$447,030,819	\$35,996,562	\$3,435,524	\$486,179,577	\$39,148,758	\$5,604,556	\$9,040,079
Supportable SF	2,935,959	3,193,077	257,118	24,539	3,472,711	279,634	40,033	64,572
Misc. Retail								
Potential Sales	\$1,410,146,333	\$1,533,640,711	\$123,494,378	\$3,435,524	\$1,667,949,413	\$134,308,702	\$5,604,556	\$9,040,079
Supportable SF	6,528,455	7,100,188	571,733	15,905	7,721,988	621,800	25,947	41,852
Total								
Potential Sales	\$4,903,655,601	\$5,333,096,067	\$429,440,466	\$17,177,619	\$5,800,142,361	\$467,046,294	\$28,022,778	\$45,200,396
Supportable SF	24,456,440	26,598,226	2,141,787	91,410	28,927,568	2,329,342	149,123	240,533
<i>Convenience Goods</i>								
Grocery				2%			2%	
Potential Sales	\$4,477,961,686	\$4,870,121,762	\$392,160,076	\$7,843,202	\$5,296,623,046	\$426,501,284	\$8,530,026	\$16,373,227
Supportable SF	11,481,953	12,487,492	1,005,539	20,111	13,581,085	1,093,593	21,872	41,983
Health & Personal Care								
Potential Sales	\$659,120,777	\$716,843,659	\$57,722,882	\$1,154,458	\$779,621,297	\$62,777,638	\$1,255,553	\$2,410,010
Supportable SF	1,805,810	1,963,955	158,145	3,163	2,135,949	171,994	3,440	6,603
Total								
Potential Sales	\$5,137,082,463	\$5,586,965,421	\$449,882,958	\$8,997,659	\$6,076,244,343	\$489,278,922	\$9,785,578	\$18,783,238
Supportable SF	13,287,763	14,451,447	1,163,684	23,274	15,717,033	1,265,587	25,312	48,585
<i>Restaurants</i>								
Potential Sales	\$2,643,249,104	\$2,874,733,168	\$231,484,064	\$9,259,363	\$3,126,488,144	\$251,754,976	\$12,587,749	\$21,847,111
Supportable SF	10,050,377	10,930,544	880,168	35,207	11,887,788	957,243	47,862	83,069
<i>Entertainment</i>								
Potential Sales	\$270,076,007	\$293,728,069	\$23,652,062	\$1,182,603	\$319,451,327	\$25,723,258	\$1,800,628	\$2,983,231
Supportable SF	3,000,845	3,263,645	262,801	13,140	3,549,459	285,814	20,007	33,147
<i>Personal Services</i>								
Potential Sales	\$691,259,258	\$751,796,686	\$60,537,428	\$1,816,123	\$817,635,338	\$65,838,652	\$1,975,160	\$3,791,282
Supportable SF	4,577,876	4,978,786	400,910	12,027	5,414,804	436,018	13,081	25,108
<b>Total</b>								
Potential Sales	\$13,645,322,433	\$14,840,319,411	\$1,194,996,978	\$38,433,366	\$16,139,961,513	\$1,299,642,102	\$54,171,893	\$92,605,259
Supportable SF	55,373,300	60,222,649	4,849,349	175,058	65,496,652	5,274,003	255,384	430,442

Sources: ESRI BIS; Urban Land Institute; Marketek, Inc.

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- The primary target market for *convenience goods* in the study area will be nearby residents as consumers are typically unwilling to travel more than a few minutes from home for most convenience goods and services. Eighteen percent (18%) of Intown Market Area households live within a three-minute drive of the study area. Accordingly, Exhibit RD-5 shows that the study area should be able to capture 12% of the Intown Market Area's potential increase in convenience store sales by 2009, increasing to 14% by 2014. When adding in potential demand generated by households within a three- to twenty-minute drive of the study area (i.e., Regional

Market Area households beyond the three-minute area) the study area can potentially capture additional sales of \$9.0 million or approximately 23,274 square feet of new convenience store space by 2009 and an additional \$9.8 million or 25,312 square feet by 2014. This level of potential demand could accommodate a market/prepared food or small-scale grocery store.

- Primary target markets for *restaurants* are Intown Market Area residents, people who work at nearby businesses and area students. The study area should be able to capture at least 4% of the increase in the sales of *food & beverages* in the Regional Market Area by 2009, resulting in additional demand of approximately 35,207 square feet of such space in the study area. Exhibit RD-5 shows that Intown Market Area residents would support 40% of this potential demand.
- By the year 2014, the study area should be able to expand its offering of *restaurants* that will result in an increase of \$12.6 million in sales or demand for 47,862 square feet of additional space. This sales level represents 5% of the increase in total Regional Market Area potential demand for *restaurants* from 2009 to 2014 (37% generated by Intown Market Area residents). This is based upon the assumption that by the year 2014, the study area should have established itself as an expanded mixed-use commercial center with a wide variety of specialty shopping, entertainment, new housing and office uses.
- The study area has the potential to capture 5% of the Regional Market Area's *entertainment* sales in 2009 and 7% in 2014, translating into sales of \$1.2 million in 2009 and \$1.8 million in 2014. The increase in potential *entertainment* sales will support an additional 13,140 square feet of space in 2009 and another 20,007 square feet in 2014. In 2009, an estimated 29% of this space is supported by Intown Market Area residents, narrowing to 24% in 2014 as the study area's reputation as an entertainment destination is expanded.
- The increase in *personal services* sales for the Regional Market Area is projected at \$60.5 million by the year 2009, increasing by an additional \$65.8 million by the year 2014. Similar to *convenience goods*, the primary market for *personal services* will be those who live within close proximity to the study area. A 3% capture of increased sales for the Regional Market Area would justify an increase of 12,027 square feet of space devoted to *personal services* by the year 2009. Based on a 3% capture by the year 2014, support for *personal services* space in the study area will have increased by another 13,081 square feet. The types of *personal services* that might be considered in the retail mix include: salon, barbers shop, shoe repair, video rental, film processing, dry cleaning, shipping/packing service and a copy center.
- Exhibit RD-7 summarizes the level of new potential supportable retail space in the study area in 2009 and 2014, derived from Intown and Regional Market Area residents. The estimate for potential retail space in the study area should be considered conservative based on the fact that expenditures of a key target market – employees of nearby businesses

who do not live in the Intown or Regional Market Areas – are not factored into estimates. As discussed in the Demographic Profile, more than 145,000 potential customers of study area businesses work within a two-mile radius of the study area. In addition to nearby workers, commuters along Marietta Street/Howell Mill Road/Northside Drive may look to the study area for a portion of their shopping needs (e.g., take-home food, drycleaner/tailor) if quality businesses were present. Also excluded from demand estimates are students at nearby colleges and universities who live outside of the Intown or Regional Market Area or are not classified as primary residents of either the Intown or Regional Market Area.<sup>2</sup> Finally, new housing developed in the study area will further boost potential demand for retail space. Clearly, estimates provided in Exhibit RD-7 are conservative as expenditures by several key groups fall outside of the model.

Exhibit RD-7

SUMMARY OF NEW POTENTIAL SUPPORTABLE RETAIL SPACE IN THE STUDY AREA  
2009-2014

Merchandise/ Service Category	Study Area New Supportable Retail Space (Square Feet)		Study Area New Supportable Retail Space (Square Feet)		Total Study Area New Supportable Retail Space (Square Feet)	
	Supported By Intown Area 2009	Supported By Regional Area 2009	Supported By Intown Area 2009	Supported By Regional Area 2009	Supported By Intown Area 2009	Supported By Regional Area 2009
<b>Shoppers Goods</b>						
Apparel	4,580	16,438	5,983	26,816	10,563	43,254
Home Furnishings	9,620	34,528	12,568	56,327	22,188	90,855
Home Improvement	6,837	24,539	8,932	40,033	15,769	64,572
Misc. Specialty Retail	4,431	15,905	5,789	25,947	10,221	41,852
Subtotal	25,468	91,410	33,273	149,123	58,741	240,533
<b>Convenience Goods</b>						
Grocery	13,969	20,111	17,743	21,872	31,712	41,983
Health & Personal Care	2,144	3,163	2,723	3,440	4,867	6,603
Subtotal	16,113	23,274	20,467	25,312	36,580	48,585
<b>Restaurants</b>	14,233	35,207	17,710	47,862	31,943	83,069
<b>Entertainment</b>	3,846	13,140	4,831	20,007	8,677	33,147
<b>Personal Services</b>	5,924	12,027	7,441	13,081	13,365	25,108
<b>Total</b>	<b>65,583</b>	<b>175,058</b>	<b>83,723</b>	<b>255,384</b>	<b>149,306</b>	<b>430,442</b>

Source: Marketek, Inc.

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### Spending Potential Index

- The Spending Potential Index (SPI) is a measure of market activity developed by ESRI Business Information Solutions and denotes actual dollars spent on certain goods and services. When the SPI is equal to 100 for a specific type of merchandise, consumers are buying or spending at a rate equal to the national average. A SPI greater than 100 indicates that consumers are buying or spending above the national average. In other words, the SPI is an indicator of what prices consumers will pay

<sup>2</sup> Students that list their parents' home as their primary residence are not included in the demographic, lifestyle or retail expenditure data.

and/or the level of their discretionary income they are willing to devote to a particular good or service. Exhibit RD-8 shows the SPI of Intown and Regional Market Area households for various types of goods and services.

Exhibit RD-8

SPENDING POTENTIAL INDEX OF SELECTED GOODS AND SERVICES  
Intown and Regional Market Areas

Merchandise/ Service Category	Spending Potential Index		Merchandise/ Service Category	Spending Potential Index	
	Intown Area	Regional Area		Intown Area	Regional Area
Apparel	133	140	Financial Services		
Men's	129	135	Investments	133	133
Women's	134	141	Auto Loans	97	107
Children's	123	131	Health		
Footwear	140	146	Nonprescription Drugs	123	133
Watches & Jewelry	137	149	Prescription Drugs	93	100
Other Apparel	141	144	Eyeglasses and Contact Lenses	96	106
Computer			Home		
Computer/Hardware for Home	104	112	Home Improvement		
Software/Accessories for Home	101	111	Maintenance/Remodeling Serv	84	102
Entertainment & Recreation	105	114	Maintenance/Remodeling Supp	77	94
Entertainment Fees & Admissions	104	113	Household Furnishings		
Membership Fees	101	112	Household Textiles	102	111
Sports Participation	97	112	Furniture	104	114
Theater/Movies/Ballet/Opera	112	118	Floor Coverings	89	104
Sporting Events	103	112	Major Appliances	95	107
Recreational Lessons	103	112	Housewares	145	162
Television & Sound Equipment	108	113	Small Appliances	99	107
Cable Television	108	111	Luggage	104	115
Color Television	106	114	Telephone & Accessories	131	143
VCR/Video Camera/DVD Player	106	114	Child Care	110	118
Video Cassettes and DVDs	107	114	Lawn & Garden	95	110
Video Game Hardware/Software	110	115	Moving/Storage	110	119
Satellite Dishes	88	102	Housekeeping Supplies	126	136
Video/DVD Rental	112	117	Insurance		
Audio Equipment	112	116	Homeowners/Renters	85	100
Rental & Repair of TV/Sound	109	117	Vehicle	102	110
Pets & Supplies	107	119	Life	92	104
Toys & Games	135	141	Health	92	102
Recreational Vehicles & Fees	76	93	Personal Care Products	131	140
Sports/Exercise Equipment & Supplies	114	126	School Books & Supplies	123	116
Photo Equipment & Supplies	105	114	Smoking Products	112	111
Books/Magazines/Subscriptions	102	109	Transportation		
Food & Beverages	132	139	Vehicle Purchases	98	107
Groceries	132	139	Gas & Oil	99	107
Bakery & Cereal Products	132	139	Vehicle Maintenance & Repair	102	111
Meats, Poultry, Fish & Eggs	134	140	Travel		
Dairy Products	130	137	Air Fare	103	112
Fruits & Vegetables	134	140	Hotels/Motels	98	108
Other Foods at Home	130	138	Rental Cars	103	113
Meals at Restaurants	133	140	Food/Drink	101	109
Alcoholic Beverages	145	147			
Nonalcoholic Beverages at Home	130	137			

Source: ESRI BIS

- Overall, the data presented in Exhibit RD-8 shows that Intown and Regional Market Area residents spend at a rate above the national average on several types of goods and services, with even higher expenditures by households within the Regional Market Area. Spending is consistently high among various types of apparel (SPI=133/140)<sup>3</sup>, particularly women's apparel (SPI=134/141), footwear (SPI=140/146), and watches & jewelry (SPI=137/149). Specialty goods and services for which expenditures are significantly above average include: toys & games (SPI=135/141), housewares (SPI=145/162), sports/exercise equipment (SPI=114/126), audio equipment (SPI=112/116) and school books & supplies (SPI=123/116). Intown and Regional Market Area residents also show above spending for personal care products (SPI=131/140), nonprescription drugs (SPI=123/133) and housekeeping supplies (SPI=126/136). In terms of entertainment, spending on theater/movie/ballet/opera (SPI=112/118) and video/DVD (SPI=112/117) rental are both high.
- Spending on all categories within the food & beverages category is extremely high, which includes food consumed at home and at restaurants. Spending on groceries (SPI=132/139) is just slightly above spending on meals at restaurants (SPI=133/140). Spending for alcoholic beverages (both at home and at restaurants) is significantly above average (SPI=145/147).
- It is important to note that goods and services for which Intown and Regional Market Area residents spend less are still likely "in demand" among these households – on the whole they just tend to pay less for them.

#### Recommended Retail Mix

- Based on demographic characteristics of Intown and Regional Market Area residents, Tapestry data, retail spending and purchasing activity of Intown and Regional Market Area residents, community input, consideration of target markets, the supply and quality of existing retail establishments in the retail market and study area, physical constraints of the study area and retail trends, the types of specialty retail goods that would be best suited for the study area include:

Men's and women's apparel (trendy, vintage, locally designed), shoes, jewelry, home furnishings/accessories, florist/garden supplies, sports/outdoors supplies, architectural antiques, bookstore, gifts/cards/toys, bookstore/magazines, music, pet supplies, cosmetics and galleries specializing a variety of artistic mediums (e.g., photography, iron welding, oil paintings, pottery, folk art, rug weaving, etc.).

- The types of convenience and personal care businesses that would appeal to area residents (particularly those living within and immediately surrounding the study area) include:

<sup>3</sup> In instances where two figures for SPI are provided, the first number represents the SPI of Intown Market Area households and the second represents Regional Market Area households.



Specialty market (gourmet, ethnic, health, etc.), video rental, drycleaners/laundry, film processing, alterations, shoe repair, gym/yoga studio, barbers shop, day spa, mail/copy center, wine/liquor store, bike repair and framing stores.

- A central component of the redevelopment process will be attracting an assortment of restaurants and entertainment businesses. Restaurants and entertainment businesses appeal to multiple target markets and unlike specialty merchandise, they do not rely as heavily on a critical mass of related businesses. A variety of ethnic restaurants (Mexican, Asian, Indian, Cajun, etc.), bakery, deli, ice cream/gelato, health food/juice bar, coffee house, pizza and diner as well as "community friendly" entertainment such as bar/sports bar/grille/pub, live theater/music/dance, blues/R&B club and an Indy playhouse are examples of types of businesses that should be attracted to the study area.
- An additional source of entertainment in the study area would be to organize a Saturday morning farmer's market that offers fresh/organic produce, baked goods, meats, breakfast, goods from community merchants as well as live entertainment. Farmer's markets are place-making activities, offer customers a unique experience and would appeal to intown residents across all income ranges and age groups. With low start up costs and virtually no competition, organizing a Saturday morning market could be an effective and manageable way to attract area shoppers.

#### **Target Markets for Retail Development**

- To optimize chances for redeveloping the study area as a vibrant mixed-use business district, the future business mix should cater to the needs and preferences of primary target markets. Primary target markets for retail development are Intown and Regional Market Area residents, area employees and students. A table summarizing the characteristics and motivations of key groups within each primary target market is provided on the previous page (Exhibit RD-9).

Primary Target Markets for Retail Development  
Upper Westside Study Area

	Primary Target Markets			
	Study Area/ Intown Residents	Regional Residents	Area Employees	Area Students
<b>Market Size</b>	Study area population is expanding rapidly. Over 157,000 live within a six-minute drive.	More than 1.4 million people live within a 20-minute drive of the study area.	More than 15,282 employees work within a one-mile radius of the study area; more than 145,636 work within a two-mile radius.	Approximately 25,000 students at Georgia Tech and Atlanta University Center. Potentially, Georgia State and Emory students.
<b>Motivations</b>	Households living within a short drive of or walk to the study will look to the Upper Westside for a variety of specialty goods and services, entertainment and day-to-day convenience goods and services.	Destination shoppers who would be willing to drive to the study area for specialty goods and services and multipurpose/complementary shoppers who are patronizing a nearby business and look to the study area for a complimentary good or service (e.g., IKEA and home accessories).	Employees who work within the immediate vicinity of the study area are a captive market in the sense that they are in the area for at least eight hours a day, five days a week and, consequently, would be likely to shop, run errands and eat out in the study area if the appropriate businesses were present.	Live and/or go to school in the area. Once dismissed as a "beer-drinking and broke" market, college students today are spending more than ever before with an estimated annual buying power of \$200 billion. College students spend an average of \$287 per month on discretionary items, largely on food and beverages, personal care products and music/CDs.
<b>Goods and Services</b>	Women and Men's Apparel (Trendy, Locally Designed) Shoes Sporting goods Jewelry Home Furnishings/Accessories Florist/Garden Supplies Architectural Antiques Bookstore/Magazines Music/CDs Gift/Cards Specialty or Ethnic Market Bakery Art Galleries Drugstore Wine/Liquor Store Video/DVD Rental Exercise studio/gym/yoga Film processing Drycleaner/Alterations Salon/Day Spa Barbers Shop Shoe Repair Banking Mail/Copy Center Toy Store Various Types of Restaurants Bar/Grille/Pub Live Theater/Music/Dance Indy Film Playhouse	Home Furnishings/Accessories Architectural Antiques Apparel – Particularly Local Designers and Off-Price Entertainment (Unique Restaurants, Theater, Dance, Movies, Music, etc.) Art Galleries Ethnic Market	Restaurants/Bars Small Market/Grocery Drugstore Items Mail/Packaging Banks/Financial Services Drycleaners/Alterations Daycare Shoe Repair Exercise studios Film Processing Apparel/Accessories, Music/CDs Books/Magazine Live entertainment Housewares	Apparel (Trendy, Vintage, Affordable) Sporting goods Books Tapes/CDs Computers/software Gifts/cards Groceries Cosmetics Ethnic Restaurants Bars/Grille/Pubs Deli Bagel/Bakery Ice Cream/Gelato/Yogurt Health Food/Juice Bar Coffee Pizza Live Music/Theater Indy Film Playhouse Health Club/Yoga Dry Cleaning/Laundry Barber/salon Bicycle repair Video rental Film processing

Source: Marketek, Inc.

## OFFICE-INDUSTRIAL MARKET POTENTIAL

As demonstrated in the previous sections, the office-industrial market for small users (2,500 to 5,000 square feet) is strong in the Upper Westside study area. However, this could change in the future as the market matures and revitalization progresses and larger companies are attracted to the area. As one real estate professional commented, "It is a promising prospect, but we aren't there yet." In any event, there are no indications that the Upper Westside will regain its former position as a warehouse/distribution nexus.

The Northyards Business Park was developed as an urban business park opening in 2002. The initial target markets for this facility were large users such as telecommunications companies and call centers. Employment potential was initially set at 1,500 to 2,000 jobs related to light manufacturing and business and office services. While Northyards failed to achieve its initial objectives, the concept of an urban business park at this location should be marketable in the long run.

Clearly, the trend toward smaller users, less industrial, more office, quasi-retail and showroom space is strengthening. The marketability of this concept has been demonstrated in the Upper Westside by the success of Puritan Mill, the retail shops at Huff and Howell Mill, and the wide array warehouse showrooms. At this point in time, however, this is an emergent submarket of undefined depth.

The concept of a business park is to offer a hybrid mix of office/industrial space where the proportion of office to industrial varies widely based on function. "Flex" space is highly marketable throughout the Atlanta metro area providing an alternative to higher office rents. In fact, business park space has been called the "office substitute." Many users who need office space need more space than traditional office projects for showrooms, storage, work space and light assembly. The concept of an urban business park should be marketable in this area. However, the space must be flexible enough to accommodate a wide range of large and small users.

## RESIDENTIAL MARKET POTENTIAL

The residential market analysis is focused on the for-sale and rental residential markets in the study area. The Residential Market Area is comprised of the area within a 20-minute drive from the study area and is considered to be the area from which a majority of potential residents of newly developed housing in the study area will be drawn. Using demographic data presented in the Demographic Profile (e.g., population growth, household income data) and 2000 Census data, estimates of potential demand for the for-sale and rental sectors for the 2004-2014 period are provided. Estimated potential demand for for-sale and rental housing is calibrated with Tapestry data to help determine the proportion of households in the market area that are realistic target markets for residential development in the study area.

### Potential Demand for For-Sale and Rental Housing

- A statistical demand analysis was performed for the Residential Market Area to estimate the potential market depth for for-sale and rental housing (Exhibits HD-1 to HD-3). Even though the analysis uses finite numbers, the end result (i.e., potential market support) should be interpreted as an approximation of market depth that is balanced with the characteristics of the competitive supply.
- The two main sources of annual potential demand for housing are new household growth and turnover. New household growth<sup>4</sup> is traditionally used to project market growth and is based on population and household growth projections. The owner and renter analyses use the average annual increase in population beginning with the 2004 estimated household base and the projected 2004-2014 annual increase in new households.
- In both the owner and renter demand analysis, the more quantitatively significant source of potential demand, turnover, has as a base the estimated number of owner or renter occupied units that will exist within the Residential Market Area during the next ten years. Projected owner or renter occupied households are qualified or segmented by owner or renter turnover rates (derived from the 2000 Census).
- Households that will potentially be owners or renters are qualified by income, household size and Tapestry data. Recognizing that potential demand for study area housing will depend on housing preferences of new and existing market area households, Tapestry data is used to narrow the estimated potential demand to include households that would be most attracted to new housing developed in the study area (e.g., young professionals, empty nesters, couples with few or no children, etc.). In other words, the appeal of residential development in the study area will vary depending on a household's characteristics or preferences. For instance, a large family may prefer a house with a big yard in a suburban setting over a loft-style condominium in a mixed-use setting.

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<sup>4</sup> New households are those currently living outside of the Residential Market Area, the majority of whom likely reside within the Atlanta Regional Commission's 10-county area.

Exhibit HD-1

POTENTIAL ANNUAL DEMAND ANALYSIS FOR FOR-SALE UNITS  
Residential Market Area  
2004-2014

New Household Demand		Turnover	
Annual New Households (1)	10,308	Total Households (1)	563,833
Owner Propensity	66%	Owner Propensity	48%
Number	6,803	Number	270,640
Target Market Adjustment (2)	30%	Turnover Rate (5)	12%
Number	2,041	Number	32,477
Income Qualified (3)	71%	Target Market Adjustment (6)	45%
Number	1,449	Number	14,615
Household Size Qualified (4)	73%	Income Qualified (7)	62%
Sub-Total	1,058	Number	9,061
		Household Size Qualified (8)	79%
		Sub-Total	7,158
Adjustment Factor (9)			15%
Total Potential Annual Market Demand			9,448

1. ESRI BIS
2. Based on Tapestry data, estimated proportion of new households to whom the proposed type of housing would appeal.
3. Estimated proportion of new households with annual incomes of \$40,000 and greater.
4. Estimated proportion of new households with 1, 2 and 3 persons.
5. U.S. Bureau of the Census estimate of the number of owner households that turnover within a 15 month period.
6. Based on Tapestry data, estimated proportion of existing market area households to whom the proposed type of housing would appeal.
7. Estimated proportion of existing households with annual incomes of \$40,000 and greater.
8. Estimated proportion of existing households with 1, 2 and 3 persons.
9. Adjustment for households that fall outside of the model.

Sources: Marketek, Inc.; Census 2000; ESRI BIS

Exhibit HD-2

POTENTIAL ANNUAL DEMAND ANALYSIS FOR RENTAL APARTMENT UNITS  
Residential Market Area  
2004-2014

New Household Demand		Turnover	
Annual New Households (1)	10,308	Total Households (1)	563,833
Renter Propensity	34%	Renter Propensity	52%
Number	3,505	Number	293,193
Target Market Adjustment(2)	30%	Turnover Rate (5)	40%
Number	1,051	Number	117,277
Income Qualified (3)	23%	Target Market Adjustment(6)	45%
Number	242	Number	52,775
Household Size Qualified (4)	73%	Income Qualified (7)	26%
Subtotal	177	Number	13,721
		Household Size Qualified (8)	79%
		Sub-Total	10,840
Adjustment Factor (9)			15%
Total Potential Annual Market Demand			12,669

1. ESRI BIS
2. Based on Tapestry data, estimated proportion of new households to whom the proposed type of housing would appeal.
3. Estimated proportion of new households with annual incomes of \$25,000-\$50,000.
4. Estimated proportion of new households with 1, 2 and 3 persons.
5. U.S. Bureau of the Census estimate of the number of renter households that turnover within a 15 month period.
6. Based on Tapestry data, estimated proportion of existing market area households to whom the proposed type of housing would appeal.
7. Estimated proportion of existing households with annual incomes of \$25,000-\$50,000.
8. Estimated proportion of existing households with 1, 2 and 3 persons.
9. Adjustment for households that fall outside of the model.

Sources: Marketek, Inc.; Census 2000; ESRI BIS

## EXHIBIT HD-3

PRELIMINARY FOR-SALE HOUSING PROGRAM  
Residential Market Area and Study Area Capture  
Ten-Year Program

	Potential Demand for New For-Sale Housing Units (1)	Study Area Capture Rate	Total Study Area Capture
Year 1	9,448	2%	189
Year 2	9,448	2%	189
Year 3	9,448	2%	189
Year 4	9,448	2%	189
Year 5	9,448	3%	283
Year 6	9,448	3%	283
Year 7	9,448	3%	283
Year 8	9,448	3%	283
Year 9	9,448	3%	283
Year 10	9,448	3%	283
Total	94,485	3%	2,457

1. As shown in Exhibit HD-1

PRELIMINARY RENTER HOUSING PROGRAM  
Residential Market Area and Study Area Capture  
Ten-Year Program

	Potential Demand for New Rental Housing Units (2)	Study Area Capture Rate	Total Study Area Capture
Year 1	12,669	3%	380
Year 2	12,669	3%	380
Year 3	12,669	3%	380
Year 4	12,669	3%	380
Year 5	12,669	3%	380
Year 6	12,669	3%	380
Year 7	12,669	4%	507
Year 8	12,669	4%	507
Year 9	12,669	4%	507
Year 10	12,669	4%	507
Total	126,689	3%	4,307

2. As shown in Exhibit HD-2

PRELIMINARY HOUSING PROGRAM  
Study Area Capture of For-Sale and Rental Product  
Ten-Year Program

	Potential Demand for New Rental and For-Sale Housing Units	Percentage of For-Sale Units	Percentage of Rental Units
Year 1	569	33%	67%
Year 2	569	33%	67%
Year 3	569	33%	67%
Year 4	569	33%	67%
Year 5	664	43%	57%
Year 6	664	43%	57%
Year 7	790	36%	64%
Year 8	790	36%	64%
Year 9	790	36%	64%
Year 10	790	36%	64%
Total	6,764	36%	64%

Sources: Marketek, Inc.; Census 2000; ESRI BIS



- It is assumed that a majority of prospective homebuyers have annual incomes of \$40,000 and higher and live in one to three person households. Based on the estimate that 48% of Residential Market Area households will own rather than rent and that 66% of new households moving into the Residential Market Area will own their homes, Exhibit HD-1 estimates that over the next ten years 9,448 households will be potential buyers of higher density, mixed-use market rate housing built in the Residential Market Area each year.
- Exhibit HD-2 presents the potential demand for market rate rental product within the Residential Market Area. Similar to Exhibit HD-1, households are qualified by Lifestyle group, income and household size. One to three person households with annual incomes between \$25,000 and \$50,000 are represented in Exhibit HD-2. An estimated 12,669 annual households in the Residential Market Area are potential renters at market rate projects set in a mixed-use setting. The potential demand analysis completed for this study does not include prospective households from outside the Market Area that would be drawn to the study area as redevelopment progresses.
- Based on an evaluation of the housing market in the Upper Westside area, planned and proposed physical improvements in the study area, the expansion of the Upper Westside's position as a mixed-use center and our experience in facilitating residential development in comparable areas, Marketek estimates that during the first ten years of development, approximately 6,764 units of market rate for-sale and rental housing units could be absorbed in the study area (Exhibit HD-3 on the previous page). Again, this estimate is narrowed by Tapestry data to include only households that would be most interested in living in a higher density, mixed-use environment.
- The projection for the potential demand for housing in the study area assumes that there will exist marketable for-sale and rental housing product and that a marketing program for new housing will be underway. The housing types will be primarily new construction and adaptive reuse.
- While the conclusion that there is unmet potential demand for housing in the Upper Westside is difficult to quantify directly, the following evidence exists to support this conclusion:
  - Strong intown/close-in residential market, fueled by the desire to reduce commuting time.
  - Accessible to nearby shopping, jobs and recreation, further heightened with the completion of the 17<sup>th</sup> Street Bridge.
  - Growing popularity of communities that connect residents to community, culture and a variety of activities.
  - Strong absorption rates at nearby for-sale developments, especially those with units priced below \$250,000, and at recently developed rental communities in the study area.
  - Although still considered a "good deal" relative to other intown neighborhoods, land/housing prices are rapidly increasing.

- Potential appeal to multiple target markets: young professionals, childless couples, empty nesters, students/parents, etc.
- Reportedly an unmet demand for intown live/work housing.
- Study area's growing identity as a cultural center separates it from other intown projects and fuels excitement.
- The study area's location in a "good" school district as well as good access to nearby private schools, including the Howard School which is moving its campus to the study area in 2005.

### **Recommended Housing Program**

- Within the estimated demand for 6,764 residential units in the study area, 36% (or 2,457 units) is for-sale product and 64% (or 4,307 units) is rental product. Marketek estimates that the study area has the potential to capture 3% of Residential Market Area demand for higher density, for-sale product and rental product between 2004 and 2014.
- Building on the study area's reputation as an emerging cultural district set within a turn of the century warehouse/industrial area, higher density for-sale and rental product that reflects the study area's urban orientation is recommended. Based on recent home sales in and close to the study area, opening price points of condominium units should range from \$160,000-\$260,000 with townhouses priced from \$190,000-\$280,000. Opening price points for scattered site single family detached infill housing in the study area's established neighborhoods should range from \$200,000 to the low \$300,000s which will appeal to families. Smaller, more affordable units will appeal to first time homebuyers, creative professionals and students while larger, more expensive units will appeal to move-up or move-over buyers as well as empty nesters/retirees. Although there is clearly demand for units priced above \$300,000, it is our opinion that when unit prices rise above this level – particularly in the early phase of redevelopment – demand will begin to thin out.
- Based on current monthly rents at market rate rental communities surveyed in the area, market rents in the range of \$1,200 to \$1,500 for a two-bedroom unit would be achievable in the study area. These rents assume the apartment communities would offer a unique architectural style, developed in a mixed-use setting and have amenities offered at competitive projects.
- Community and unit amenities at competitive rental projects as well as a recent national survey of renters conducted by the National Association of Home Builders indicate that convenient, secure parking should be provided with at least one space per unit at no charge. Community features should include an exercise facility, a pool and security measures. Washer/dryer hookup or washer/dryer, balcony, extra storage, dishwasher/disposal, cable-ready and high-speed Internet access should be standard unit features.
- Many successful rental projects throughout the nation incorporate features that were once reserved for owner occupied homes. Developers have incorporated private street level entrances, assigned street addresses to individual units, provided garages and storage with direct

access to the unit, incorporated courtyards and used building materials and architectural styles consistent with surrounding single family communities to enable residents of rental communities to feel less like “renters.”

- Live/work units – rental, condominiums, cooperative and owner occupied – should be considered to accommodate growing numbers of people who are seeking larger than average space that is adaptable to living and working. The concept of live/work housing has shifted from affordable housing for artists in a handful of densely developed areas (e.g., New York City) to a nationwide trend of providing housing that meets the aesthetic and practical needs of a growing work-at-home market. Live/work units range from smaller (1,000 square feet) open floor plans with exposed structural features and curtains/low walls to separate living/working space to higher end commercial first floor space (retail, office, service, technology-based) with upper level (one or two floors) living areas accessed by a separate entrance.
- Live/work space that accommodates creative professionals – ranging from painters, graphic designers, writers, photographers – would further boost the Upper Westside’s image as a cultural enclave. Existing industrial/warehouse space could be redeveloped as live/work units as well as infill projects. Ideally, units should be affordable – particularly for artists – which will mandate smaller unit size and, perhaps, require public/private financing. Artspace Projects is a leading non-profit organization that has developed artist live/work space throughout the nation. Within the study area there are several loft projects housed in former industrial spaces (e.g., Hastings Seed Lofts, the Roxy Lofts, Giant Lofts, Carriage Works) that are well suited for live/work. Price tags at these projects are reaching above \$300,000.
- As housing development proceeds in the study area and a critical mass of units is created, the absorption of housing units will gain momentum and boost prices. New housing development will act as an anchor that will attract businesses, services and activities, enlivening the overall district.

#### **Target Markets for Residential Development**

- Early residents of newly developed housing in the study area are likely to be relatively mobile, well educated, artistic, active and somewhat adventuresome. While young professionals and empty nesters remain a primary market segment for intown/close-in, mixed-use housing development, the demand for this type of housing is growing. Shorter commutes, lower maintenance and immediate access to a variety of uses are part of the explanation. However, a significant factor is the growing post 9/11 need of people to feel connected to friends, family and community. This phenomenon, described as “Hiving,” supports the type of housing development that is proposed for the study area: development that blends work, community, recreation and living.
- Exhibit HD-4 on the following page provides a generalized summary of primary target markets for residential development in the study area. Prospective residents will primarily include professional singles and couples

with few or no children (e.g., *Laptops and Lattes* and *Metro Renters*), employees who work nearby, empty nesters interested in downsizing or securing a second residence, area students and/or their parents wishing to invest in a home rather than loose monthly rent payments.

- As mentioned before, live/work space is a viable residential format in the study area. Cities throughout the nation are recognizing the benefits of fostering the expansion of the “creative class.” The study area is well positioned to serve as an enclave of creative professionals – something

EXHIBIT HD-4

PRIMARY TARGET MARKET CHARACTERISTICS FOR NEWLY DEVELOPED HOUSING IN THE UPPER WESTSIDE

	For-Sale Product	Rental Product	Live/Work Units For-Sale and Rental
Occupation Age Household Size Income Approximate Price Point Motivations/Preferences	<b>Entry-Level Professionals</b> 25 to 35 1 to 2 persons, few with children \$40,000-\$60,000 \$160,000-\$240,000 Access to work/downtown Location with identity/sense of place Tired of rentals/first time buyer Investment and resale important Seek vibrant, mixed-use setting Intown lifestyle without intown pricetag Relatively mobile	<b>Entry-Level Professionals</b> 25 to 35 1 to 2 persons, few with children \$30,000-\$40,000 \$800 Alone/\$1,300 Roommate Access to work/downtown Seek vibrant, mixed-use setting Location with identity/sense of place Highly Mobile	<b>Creatives/Professionals</b> 25+ 1 to 2 persons, few children \$30,000+ \$160,000+ Buy/\$800+ Rent Seek urban lifestyle Seek large adaptable spaces Access to suppliers, customers Creative community Relatively mobile
Occupation Age Household Size Income Approximate Price Point Motivations/Preferences	<b>Higher Level Professionals</b> 30 to 50 1 to 2 persons, some with children \$60,000+ \$240,000-\$500,000 Access to work/downtown Move-up or move-over buyer Seek vibrant, mixed-use setting Value authenticity/community Investment and resale important Relatively mobile	<b>Higher Level Professionals</b> 30 to 50 1 to 2 persons, few with children \$40,000+ \$1,100-\$1,500 Access to work/downtown/MARTA Location with identity/sense of place Seek vibrant, mixed-use setting Relatively mobile	<b>Creatives</b> Advertising, marketing, arts, film & music, software developers, inventors, photographers, designers, culinary, apparel design  <b>Professionals</b> More traditional fields of accounting/finance, education, law, various types of consulting
Occupation Age Household Size Income Approximate Price Point Motivations/Preferences	<b>College Parents</b> 50+ Varies \$80,000+ \$150,000-\$300,000 Child at nearby college/university Close to school/safe Investment and resale a priority After graduation, move in or sell	<b>Empty Nesters/Retirees</b> 55+ 1 to 2 persons \$35,000 or available equity \$1,000-\$1,500 Possibly close to children Walk to businesses/services Proximity to cultural activities Less maintenance, more security Seeking intown lifestyle Relatively settled Primary or second residence	
Occupation Age Household Size Income Approximate Price Point Motivations/Preferences	<b>Empty Nesters/Retirees</b> 55+ 1 to 2 persons \$35,000 and/or available equity \$180,000-\$350,000 Possibly close to children Walk to businesses/services Proximity to cultural activities Less maintenance, more security Move-over, move-down buyer Highly settled Value over investment Primary or second residence	<b>Students</b> 18 to 30 Single with/without roommate Varies \$750 Alone/\$1,400 Roommate/s Close to school, friends Seek vibrant, mixed-use setting Highly mobile Security conscience Trendy/creative atmosphere	

Source: Marketek, Inc.

that has not been fully achieved in Atlanta's intown neighborhoods. High prices, a lack of diversity, poor access and "yuppyfication" have all worked to discourage a concentration of creative professionals in other intown neighborhoods. Keeping housing prices affordable and the development reflective of the surrounding community will play a key role in reaching the creative market.

- As housing development in the study area gains momentum, the demand for new housing will be augmented by groups outside of the Residential Market Area such as married couples with and without children, empty nesters, retirees and professionals that work within commuting distance of their jobs. The Upper Westside's growing reputation as an accessible, relatively affordable and culturally rich community will undoubtedly prove to be a key strength in marketing housing in the study area.





# APPENDIX D

## LEED EXAMPLE



# The Management Building, Technology Square

LEED® Project # 0057

LEED Version 2 Certification Level: Silver

August 27, 2003

## 35 Points Achieved

Possible Points: 69

Certified 26 to 32 points Silver 33 to 38 points Gold 39 to 51 points Platinum 52 or more points

### 9 Sustainable Sites Possible Points: 14

Y	Prereq 1	Erosion & Sedimentation Control	
1	Credit 1	Site Selection	1
1	Credit 2	Urban Redevelopment	1
	Credit 3	Brownfield Redevelopment	1
1	Credit 4.1	Alternative Transportation, Public Transportation Access	1
1	Credit 4.2	Alternative Transportation, Bicycle Storage & Changing Rooms	1
1	Credit 4.3	Alternative Transportation, Alternative Fuel Refueling Stations	1
1	Credit 4.4	Alternative Transportation, Parking Capacity	1
	Credit 5.1	Reduced Site Disturbance, Protect or Restore Open Space	1
1	Credit 5.2	Reduced Site Disturbance, Development Footprint	1
	Credit 6.1	Stormwater Management, Rate and Quantity	1
	Credit 6.2	Stormwater Management, Treatment	1
1	Credit 7.1	Landscape & Exterior Design to Reduce Heat Islands, Non-Roof	1
1	Credit 7.2	Landscape & Exterior Design to Reduce Heat Islands, Roof	1
	Credit 8	Light Pollution Reduction	1

### 3 Water Efficiency Possible Points: 5

Y			
1	Credit 1.1	Water Efficient Landscaping, Reduce by 50%	1
	Credit 1.2	Water Efficient Landscaping, No Potable Use or No Irrigation	1
	Credit 2	Innovative Wastewater Technologies	1
1	Credit 3.1	Water Use Reduction, 20% Reduction	1
1	Credit 3.2	Water Use Reduction, 30% Reduction	1

### 2 Energy & Atmosphere Possible Points: 17

Y			
Y	Prereq 1	Fundamental Building Systems Commissioning	
Y	Prereq 2	Minimum Energy Performance	
Y	Prereq 3	CFC Reduction in HVAC&R Equipment	
1	Credit 1.1	Optimize Energy Performance, 20% New / 10% Existing	2
	Credit 1.2	Optimize Energy Performance, 30% New / 20% Existing	2
	Credit 1.3	Optimize Energy Performance, 40% New / 30% Existing	2
	Credit 1.4	Optimize Energy Performance, 50% New / 40% Existing	2
	Credit 1.5	Optimize Energy Performance, 60% New / 50% Existing	2
	Credit 2.1	Renewable Energy, 5%	1
	Credit 2.2	Renewable Energy, 10%	1
	Credit 2.3	Renewable Energy, 20%	1
	Credit 3	Additional Commissioning	1
1	Credit 4	Ozone Depletion	1
	Credit 5	Measurement & Verification	1
	Credit 6	Green Power	1

### 6 Materials & Resources Possible Points: 13

Y	Prereq 1	Storage & Collection of Recyclables	
	Credit 1.1	Building Reuse, Maintain 75% of Existing Shell	1
	Credit 1.2	Building Reuse, Maintain 100% of Existing Shell	1
	Credit 1.3	Building Reuse, Maintain 100% Shell & 50% Non-Shell	1
1	Credit 2.1	Construction Waste Management, Divert 50%	1
1	Credit 2.2	Construction Waste Management, Divert 75%	1
	Credit 3.1	Resource Reuse, Specify 5%	1
	Credit 3.2	Resource Reuse, Specify 10%	1
1	Credit 4.1	Recycled Content	1
1	Credit 4.2	Recycled Content	1
1	Credit 5.1	Local/Regional Materials, 20% Manufactured Locally	1
1	Credit 5.2	Local/Regional Materials, of 20% Above, 50% Harvested Locally	1
	Credit 6	Rapidly Renewable Materials	1
	Credit 7	Certified Wood	1

### 10 Indoor Environmental Quality Possible Points: 15

Y			
Y	Prereq 1	Minimum IAQ Performance	
Y	Prereq 2	Environmental Tobacco Smoke (ETS) Control	
1	Credit 1	Carbon Dioxide (CO <sub>2</sub> ) Monitoring	1
	Credit 2	Increase Ventilation Effectiveness	1
1	Credit 3.1	Construction IAQ Management Plan, During Construction	1
1	Credit 3.2	Construction IAQ Management Plan, Before Occupancy	1
1	Credit 4.1	Low-Emitting Materials, Adhesives & Sealants	1
1	Credit 4.2	Low-Emitting Materials, Paints	1
1	Credit 4.3	Low-Emitting Materials, Carpet	1
1	Credit 4.4	Low-Emitting Materials, Composite Wood	1
1	Credit 5	Indoor Chemical & Pollutant Source Control	1
	Credit 6.1	Controllability of Systems, Perimeter	1
	Credit 6.2	Controllability of Systems, Non-Perimeter	1
1	Credit 7.1	Thermal Comfort, Comply with ASHRAE 55-1992	1
1	Credit 7.2	Thermal Comfort, Permanent Monitoring System	1
	Credit 8.1	Daylight & Views, Daylight 75% of Spaces	1
	Credit 8.2	Daylight & Views, Views for 90% of Spaces	1

### 5 Innovation & Design Process Possible Points: 5

Y			
1	Credit 1.1	Innovation in Design: Exemplary Performance, Recycled Content	1
1	Credit 1.2	Innovation in Design: Exemplary Performance, Local Materials	1
1	Credit 1.3	Innovation in Design: Sustainability Education	1
1	Credit 1.4	Innovation in Design: Comprehensive Tree Relocation	1
1	Credit 2	LEED® Accredited Professional	1





# APPENDIX E

## DESIGN GUIDELINES

## Significant Buildings in the Upper Westside

Name of Project: 736 Jefferson Street

Photo Source:

Location of Project: Approximately 1,000 feet west of Georgia Tech and adjacent to the west side of the Norfolk Southern rail line in the "Mid-Artery" section of the study area

Address (if local): 736 Jefferson St NW Atlanta, GA 30318

Description (Key Features):



Name of Project: Standard Oil Company Inc. of Kentucky/Allied Factory Warehouse #2

Photo Source:

Location of Project: Approximately 450 feet southwest of Georgia Tech and adjacent to the northeast side of the Norfolk Southern rail line in the "Mid-Artery" section of the study area

Address (if local): 500 Means Street NW Atlanta GA 30318

Description (Key Features)<sup>1</sup>: Utilitarian industrial, constructed in the late 1800s, currently used as a 10-loft live/work space



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<sup>1</sup> Allied Factory Warehouse. Marietta Street Artery Online: <http://www.artery.org/AlliedWH.htm>.

Name of Project: Gas Station

Photo Source:

Location of Project:

Address (if local):

Description (Key Features):



Name of Project: Grace Manufacturing at King Plow

Photo Source:

Location of Project: Located approximately 750 feet northwest of the intersection of West Marietta Street, Joseph E. Lowery Boulevard, and Eighth Street

Address (if local): 957 W Marietta St. NW Atlanta, GA 30318

Description (Key Features): Former farm equipment manufacturing facility, currently used as live/work space, theater, and museum





Name of Project: Iron-Works International, Inc. (Formerly Horace G. Poss and Co. Inc.)

Photo Source:

Location of Project: Located at the intersection of Howell Mill Road and Brady Avenue

Address (if local): 1085 Howell Mill Rd. NW Atlanta, GA 30318

Description (Key Features)<sup>2</sup>: Past and current uses include welding metal work. Angelo Viale of Iron-Works International, Inc. is the present owner.



Name of Project: English Avenue Elementary School

Photo Source:

Location of Project: located on English Avenue between Donald Lee Holloway Parkway and Pelham Street

Address (if local): 627 English Avenue

Description (Key Features)<sup>3</sup>: Originally built in 1910 on 3.4 acres and is owned by Atlanta Public School System; currently zoned R-5 (two-family residential)



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<sup>2</sup> Marietta Street Artery. Online: <http://www.artery.org/HGPoss.htm>.

<sup>3</sup> Atlanta Public Schools Excess Properties, Properties Analysis Report for the English Avenue Elementary School. Online: [http://www.atlanta.k12.ga.us/news/goodnews/121004/property/English\\_Avenue.pdf](http://www.atlanta.k12.ga.us/news/goodnews/121004/property/English_Avenue.pdf). August 2, 2004.

Name of Project: Atlanta Union Mission – My Sister's House (formerly the Laura Haygood Grade School)

Photo Source:

Location of Project: Located at the intersection of Howell Mill Road and Eighth Street

Address (if local): 921 Howell Mill Rd., NW Atlanta, GA 30318

Description (Key Features): Constructed in 1938 as an all female grade school. Currently serves as a shelter for over 250 women and children.



Name of Project: Saddle Shop

Photo Source:

Location of Project: Located at the intersection of Brady Avenue and Eighth Street

Address (if local): 914 Brady Ave. NW Atlanta, GA 30318

Description (Key Features)<sup>4</sup>: Built in 1914, the Saddle Shop was used during the operation of the Miller Union Stock Yards



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<sup>4</sup> Marietta Street Artery. Online: <http://www.artery.org/SaddleShop.htm>.

Name of Project: H. B. Davis Building/Hotel Roxy

Photo Source:

Location of Project: Located on Marietta Street, west of the Regents Drive intersection

Address (if local): 764-772 Marietta Street Atlanta, GA 30318

Description (Key Features): Originally constructed in 1921, the hotel portion opened in the building in 1939. The building was converted to residential use (loft space) in 1995.



Name of Project: Typical Mill Housing

Photo Source:

Location of Project: Includes Bland Town, Howell Station, Home Park, and Exposition Cotton Mills (demolished in 1971)

Address (if local):

Description (Key Features)<sup>5</sup>: Housing built in the late nineteenth-century for blue-collar textile mill workers; many units were demolished in the 1970s. Typical mill housing includes the Shotgun, Georgian cottage, Bungalow, Gabled-El cottage, Queen Anne cottage, New South cottage, and Hall-Parlor styles.



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<sup>5</sup> Marietta Street Artery. Exposition Cotton Mills, Online:  
<http://www.artery.org/ExCotMills.htm#housing>.

Name of Project: Atlanta Water Works

Photo Source:

Location of Project: Hemphill and 14th Street NW

Address (if local): 1210 Hemphill Ave., NW. Atlanta, GA 30318

Description (Key Features): Engineers Robert M. Clayton and William G. Richards designed the Atlanta Water Works for construction in 1875



Name of Project: Westinghouse Electric and Manufacturing Co.

Photo Source:

Location of Project: Southern Railway and the corner of Bishop Street and Northside Drive

Address (if local): 426 Marietta St., NW Atlanta, GA 30318

Description (Key Features): Constructed before 1932 (exact date unknown) and was used as a manufacturing facility. A portion of the building is currently used as an office space.





## Examples of Context Appropriate Rehabilitation in the Upper Westside

Name of Project: Southeastern Meat Company, Inc.

Photo Source:

Location of Project: Located at the intersection of Howell Mill Road and Eighth Street

Address (if local): 914 Howell Mill Road NW Atlanta, GA 30318

Description (Key Features): Constructed in 1908



Name of Project: King Plow Arts Center

Photo Source:

Location of Project: Located north of the West Marietta Street and Joseph E. Lowery Boulevard intersection.

Address (if local): 887 West Marietta Street NW Atlanta, GA 30318

Description (Key Features)<sup>1</sup>: Originally constructed in 1890, the King Plow Company historically used the facility for plow manufacturing. Most of the buildings that comprise this facility were built between 1936 and 1938.



<sup>1</sup> Marietta Street Artery. Online: <http://www.artery.org/KingPlow.htm>.

Name of Project: Lumber Yards

Photo Source:

Location of Project:

Address (if local):

Description (Key Features):



## **Examples of Context Appropriate New Construction in the Upper Westside**

Name of Project: Collins Printing

Photo Source:

Location of Project: Across from Centennial Olympic Park

Address (if local):

Description (Key Features):



Name of Project: Chico's Casual Clothing

Photo Source:

Location of Project: Located at the intersection of North Highland Avenue and Los Angeles Avenue

Address (if local): 1056 N Highland Ave NE, Atlanta, 30306

Description (Key Features):



Name of Project:

Photo Source:

Location of Project: Berkeley Park

Address (if local):

Description (Key Features):







## APPENDIX F

# REDEVELOPMENT GUIDELINES

## REDEVELOPMENT GUIDELINES

The following section is intended to provide guidelines on how the study area should position itself to capture potential demand for retail, residential and office-industrial space and propose next steps to achieve this potential.

### Competitive Assessment

Key observations about the competitive environment for retail, residential and office-industrial expansion and development in the Upper Westside study area are noted below.

Opportunities/Strengths	Challenges
Ongoing investment (Midtown West, Atlantic Station, M West, The Howard School, Westside Urban Market, etc.) demonstrates the economic viability of the area.	An abundance of nearby housing and retail development in Midtown/Downtown could weaken market support, especially for higher density housing.
Strong access (via I-75/85, The Beltline, Howell Mill Road, Marietta Street/Boulevard, 17 <sup>th</sup> Street Bridge, etc.) and relative affordability are key selling points for ALL redevelopment activity.	Environmental issues – how much land is really available (e.g., suitable for redevelopment)?
Although increasing, competitive land prices suggest the potential for much needed workforce/artist housing.	Unkempt lots/underutilized structures have portrayed parts of the study area as junkyards.
Conversion of warehouse/distribution to retail/service/residential is helping to diminish the area's industrial image.	Bridging economic, demographic and social gaps among community residents.
Historic buildings/character, unique history and enhanced cultural image distinguish the Upper Westside from its competitors.	Flooding in parts of the study area will need to be resolved.
Successful retail clustering (e.g., home furnishings/décor) and recruitment of creative businesses have created a base upon which to build new development.	Gentrification: as the area gains popularity, land prices/taxes will increase, possibility impacting existing residents and business owners.
Tax incentives (25 year abatement) will help lure developers to the area.	Disconnect between neighborhoods and commercial areas.
Diversity (age, income, race, occupation, etc.) contributes to the area's sense of authenticity.	Strong base of destination retail but little neighborhood-serving retail.
Single family infill opportunities in surrounding neighborhoods.	Combining livability and activity (e.g., new housing with entertainment).
Remaining adaptive reuse opportunities.	Renovation of existing structures may be cost prohibitive. Consideration of alternative uses (e.g., housing, incubator space) and public assistance may be necessary.

Opportunities/Strengths	Challenges
Available land, unlike other intown areas that have been built out.	
Ties to education (proximity to Georgia Tech/Atlanta University Center, relocation of the Howard school, within a “good” school district) will help draw new residents, boost retail sales and attract industry.	
Live/work space for artists will help enhance area’s cultural image. Also consider sales tax exemption for art made in the district.	
Growing residential population will boost demand/prospect for neighborhood-serving retail.	

### Key Principles

Clearly there is potentially strong demand for new retail and residential development in the study area. Implementing a successful redevelopment program will pivot on the study area’s ability to offer businesses, residents and customers an environment different from what they can find elsewhere in the area. The following guiding principles should be considered throughout the redevelopment process:

- **Brand Yourself.** The Upper Westside must perceive itself as a product and market itself to compete with other nearby business districts. Developing a brand theme upon which all other initiatives are based – e.g., logo, urban design, signage, advertising, marketing collateral, website, etc. – is a key step in the marketing process. Business districts and communities that win in the long run are those that create brand personalities that connect with people, that share values and that build long term relationships.
- **Looks Count.** Aesthetics is one of the most serious obstacles to redevelopment in the study area – vacant and/or unkempt buildings and lots, an absence of unifying design elements, etc. The study area must recreate itself as a vibrant, clean and safe business district in the eyes of prospective businesses and target markets. Implementing consistent design standards, promoting dense development and eliminating unattractive/obsolete structures are just a few remedies.
- **Cluster and Focus.** A critical component of retail development is the creation of a compact, unified district with complementary businesses that benefit from each other’s sales, customers and markets. The primary vehicle for developing unified groups of stores and businesses is clustering – creating mutual advantages in terms of pedestrian flow and shared markets between businesses. Successful clustering is dependent upon having the appropriate mix of businesses that will create market synergies and an uninterrupted grouping of businesses that draw customers to and



through the entire business district. The study area has already established a successful cluster of home furnishings businesses. Educating business owners, property owners and real estate professionals about the importance of using this business development tool is critical.

- **Different is Good.** Within the next year, a variety of national retailers will be opening stores at Atlantic Station. While national retailers will appeal to a wide market and demonstrate that the area is economically viable, they also mimic what can be found in shopping districts throughout the nation. The Upper Westside has the potential to set itself apart from Atlantic Station as well as area malls and shopping by attracting one-of-a-kind businesses. Unique restaurants (ethnic, gourmet/ethnic market, sidewalk cafes) and smaller, unique stores (potentially homegrown) should be the focus of business recruitment efforts.
- **Know What You Have to Offer.** One of the best strategies for recruiting developers is to be able to provide an inventory of available real estate, and better yet, be in the position to bring key properties to the table. Sites and buildings should be ranked according to their potential for redevelopment or locational importance, categorized as a short-term or long-term potential initiative and marketed via collateral specification sheets.
- **Walk, Walk, Walk.** To overcome existing negative perceptions of the study area, creating a safe, pleasant and convenient atmosphere for pedestrians should be a priority redevelopment initiative. Although customers will more often than not use their cars to reach the study area, using design and land use planning to encourage pedestrian activity will enliven the overall area, reduce traffic and invoke a sense of community.
- **Value Added Recruitment.** Ideally, recruitment efforts should concentrate on attracting businesses that do more than just provide service sector jobs, which are typically low paying, low skilled positions. Attracting businesses that serve the needs of nearby residents (e.g., day care, laundry/dry cleaning, bank, etc.), that hire and train neighborhood residents or are owned by nearby residents, will help to strengthen the surrounding community. Establishing a business incubator to facilitate start-up businesses owned by area residents – businesses that may remain and expand in the study area long term – is another option.
- **Low Impact.** As the study area continues to build a residential base, attracting “low impact” businesses will be key. While attracting entertainment businesses should be a cornerstone of recruitment efforts, these businesses should enhance rather than detract from the livability of the study area. For instance, a brewpub would be more appropriate than a late night dance club. Low impact development should also apply to office/industrial recruitment, particularly as the study area is moving away from its image as an industrial/warehouse district.
- **Safety First.** Customers and residents of new housing will need to feel safe. Security features such as alarm systems, controlled access to parking and interior areas, exterior lighting, intercoms, illumination of all areas where

residents circulate and design features that discourage crime will be a requirement of new housing located in the study area. Housing units that are elevated above retail and parking foster a sense of security. While security features are a prime marketing asset, it is vitally important that they are not so overwhelming that they create a feeling of fortification between the development and the surrounding community.

- **Get the Word Out.** Working with the local media to highlight success stories and monitor construction throughout the study area will help convince target markets that the study area is an attractive and unique place to live/work/play. Other effective forms of communication include newsletters, websites that keep potential residents up-to-date on special events and organizing a speaker's bureau.
- **Real Communities Work.** Offering a variety of housing options that meet the needs of varying income and age groups helps create authentic, vibrant and sustainable communities. While land prices are increasing in the study area, "deals" can still be found relative to other intown neighborhoods. As redevelopment progresses, however, land/housing prices will inevitably increase. Encouraging smaller unit size, denser development, in-law/accessory units in single family development are just some examples of ways to keep housing prices down. Housing and studio space for struggling artists could enhance the study area's image as a cultural enclave but will almost certainly require some level of subsidy. Also, taking steps to ensure that long time residents can remain in the community – particularly seniors – as redevelopment progresses through such measures as equitable property taxes, home repair grants and debt counseling will help maintain a variety of income groups in the study area. Establishing a housing revolving loan fund to offset down payments, closing costs and renovations is one potential strategy to attract and maintain a variety of income groups.

### Market Position

In today's competitive environment, being the most accessible, the most affordable or even the best designed community does not guarantee success. Since redevelopment potential in the Upper Westside is strong, success will largely be measured by how a specific vision for the community is realized. For instance, feedback from the community indicates that the study area's thriving arts community, diversity (age, income, race/ethnic origin, land uses) and history as an industrial district are all qualities that should be preserved and promoted throughout the redevelopment process. It is important that the study area differentiate itself and not seek to replicate what has already been done in other intown neighborhoods and businesses districts.

- **Retail Market**

*Vibrant collection of retail, cultural and entertainment uses that appeal to intown residents and destination shoppers as well as neighborhood-serving retail.*

The anticipated delivery of 1.7 million square feet of retail space at Atlantic Station will undoubtedly enhance the potential for retail

development in the Upper Westside. The study area has established itself as a destination for home furnishings/decorating goods and services but continues to lack neighborhood-serving retail. New housing combined with the growing marketability of the Upper Westside will enable the study area to attract retail businesses that serve internal and external markets.

- **Residential Market**

*A variety of housing options that draw a diverse mix of residents, set within an historic, urban context.*

Atlanta's intown housing market managed to stay the course throughout recent turbulent economic times. Shorter commutes, unique housing options and access to shopping/entertainment all play a role in a strong intown housing market. With mixed-use residential developments rising up throughout Atlanta, one ingredient that many fail to incorporate is an authentic sense of community. While the Upper Westside historically maintained a limited residential base, "real" communities such as Blandtown and English Avenue persevered and today have a rich and unique story to tell. Pioneering artists and creative professionals who live and work in the neighborhood shifted the Upper Westside from one of a forgotten industrial district to one of the city's trendiest areas. The Upper Westside's diversity of residents, history and unique architecture all work together to make it an authentic community – something absent in so many newly development residential projects.

- **Office-Industrial Market.**

*Transitioning industrial/warehouse/distribution district where smaller, niche spaces are taking hold and existing industrial businesses are preserved.*

The study area's office-industrial market is transitioning from one that was historically dominated by large industrial/distribution/warehouse spaces to smaller light industrial/office spaces (i.e., less than 5,000 square feet) and retail/quasi-retail space. Lackluster sales/leasing activity at Northyards further reinforces this trend. Existing industrial businesses in the study area generate valuable jobs and should be preserved. Interviews with real estate professionals and leasing activity indicate that the market for smaller spaces remains strong. Attracting education-related and creative industries (e.g., R&D, Internet based, etc.) would help to boost the area's growing reputation as a community of forward thinking/creative professionals. In addition, the study area is well positioned to offer meeting spaces for area businesses and the meeting/event space convention industry.

### **Next Steps**

General "next steps" in successfully promoting and capitalizing on the market opportunities identified in the market analysis are outlined below.

Next Steps
<ul style="list-style-type: none"><li>• Create a brand identity for the study area to be incorporated in all marketing and development initiatives (logos, brochures, website, building design, etc.)</li></ul>

Next Steps
<ul style="list-style-type: none"> <li>Investigate possible tax incentives to lure artists to the community (e.g., affordable housing/studio space, tax free art sales, etc.).</li> </ul>
<ul style="list-style-type: none"> <li>Work to help ensure that existing residents are able to remain in the community as redevelopment progresses (e.g., home repair programs, education regarding property tax breaks for senior citizens, fair tax assessments, etc.).</li> </ul>
<ul style="list-style-type: none"> <li>Consider adopting measures to maintain housing affordability (e.g., revolving loan fund, unit size restrictions, in-law/accessory units in single family development, etc.).</li> </ul>
<ul style="list-style-type: none"> <li>Investigate feasibility of providing incubator space for entrepreneurs living in the area.</li> </ul>
<ul style="list-style-type: none"> <li>Prepare an inventory of existing sites/buildings within the core redevelopment area that includes ownership, condition, use, value of land, lease rates/terms, etc.</li> </ul>
<ul style="list-style-type: none"> <li>Develop collateral marketing materials (i.e., CD-ROMs, market opportunity fact sheets, prospect packages, etc.) specifying potential redevelopment opportunities in the study area.</li> </ul>
<ul style="list-style-type: none"> <li>Create and maintain referral networks with area brokers, economic development agencies, developers, etc. and educate them regarding the types of businesses, housing and activities most appropriate for the study area.</li> </ul>
<ul style="list-style-type: none"> <li>Invest in developing a website specific to the study area that communicates its identity to existing and prospective businesses, residents and customers. Train county/city staff to update site.</li> </ul>
<ul style="list-style-type: none"> <li>Enable developers and prospective businesses to access downloadable recruitment material and applications.</li> </ul>
<ul style="list-style-type: none"> <li>Institute a community wide "clean-up" program, with emphasis on high traffic areas.</li> </ul>





# APPENDIX G

## 25 YEAR PROJECTION

## Upper Westside 25 Year Projections

### Housing Projections

	Current 2004	Projection 2009	Projection 2014	Projection 2019	Projection 2024	Projection 2029
Single Family	271	321	346	356	366	376
Multifamily	1,093	4,026	6,372	8,719	11,065	12,825
Total	1,364	4,347	6,718	9,075	11,431	13,201

### Population Projections

	Current 2004	Projection 2009	Projection 2014	Projection 2019	Projection 2024	Projection 2029
Population	6,127	12,638	17,846	23,054	28,262	32,169

### Employment Projections

	Current 2004	Projection 2009	Projection 2014	Projection 2019	Projection 2024	Projection 2029
Employment	11,733	13,820	15,489	17,159	18,828	20,080
Commercial Development (square feet)	5,779,286	6,481,056	7,042,471	7,603,887	8,165,303	8,586,365

## **Appendix G - Projection Methodology**

### **Population, Housing Unit, and Employment Projection Methodology**

#### **Summary**

Population projections for the study area are primarily based on the area's residential market potential. Each new housing unit is associated with a number of new residents for the study area. Employment projections are primarily based on the area's market potential for new commercial and office development. Each type of commercial space is associated with a certain number of employees per floor area. This standard is used to convert new commercial space into an approximate number of new employees.

#### **Existing Population and Employment**

Estimates for existing populations and existing number of households is primarily based on 2000 Census information. Additional population and housing units were added to take into account new residential development since 2000, with these numbers based on reported occupancy of new residential developments.

Existing employment was based upon ESRI GIS information for the study area. This number was adjusted upwards to take into account the high concentration of employees located at the Coca Cola Headquarters on North Avenue in the far southeast of the study area.

#### **Retail Market Potential**

Retail market potential is driven by population growth in the Intown Area and Regional Area markets. As these populations grow, the total amount of money spent on retail services in these markets increases. This increase in retail spending is divided into categories by type of merchandise. Dollars spent on merchandise are converted into potential square feet of retail space based on national averages of retail spending per square foot. The different demographic profiles of the Intown and Regional Area markets result in different spending patterns, with their retail spending distributed among the categories differently. Therefore population growth drives spending growth, which in turn drives the development of new retail space.

The study area is expected to capture a percentage of the growth in retail spending of the Intown Area and Regional Area markets. This percentage varies from 10-16% of Intown Market spending and 2-7% of Regional Market spending. The percent capture depends upon the type of merchandise or service and whether the Intown or Regional market is involved. For example, the study area is expected to capture a high share of the entertainment market for the Regional Market Area at 5%. This estimate is based on existing trends for entertainment to be located in the study area. However the study area is only



expected to capture 2% of the Regional Market Area's demand for convenience goods, because shoppers generally seek close-by locations for convenience goods. Overall, capture rates for the study area are based on existing patterns of retail clustering and distribution as well as general patterns in retail behavior observed nation-wide.

The retail market potential is estimated to be conservative because it does not take into account growing retail spending among area employees. The retail market potential model is based solely on projected Intown and Regional Market Area population growth.

### **Residential Market Potential**

Residential market potential is driven by two key components: household growth and residential market turnover. The larger component of demand is residential market turnover. Household growth is modeled based on predicted population growth and predicted changes in household size. Estimated turnover rates for households are assumed to vary by housing tenure and are based on data from the 2000 Census. The relevant Residential Market Area for calculating residential turnover is the Regional Market Area, or the 20-minute drive. New residents to the study area are expected to come predominantly from this area.

Once the total potential for new units is derived for the Residential Market Area, this potential is whittled down through a series of filters that suggest suitability for living in the study area. The filters include income qualification, household size qualification, and target market adjustment. Target market adjustment is based on a demographic segmentation that separates the population into demographic groups that have differing propensities for residing in the study area. The potential for new units is also segmented into owner-propensity and renter-propensity unit types.

Finally a capture rate is applied to this smaller group of qualified potential households. The capture rate for home owners is estimated at 2-3% and the capture rate among renters is estimated at 3-4%. The capture rate is expected to grow with time as the area redevelops and becomes attractive to a wider market.

### **Office/Industrial Market Potential**

The growth in office/industrial space is expected to primarily be office space and flex space. The estimate for new office space is about 80,000 square feet per year for the next 25 years. This estimate is based on the size and timing of recent office/mixed use developments such as Puritan Mill, Mean Street, and King Plow. Also, the consultant team expects the study area to become more attractive for office space as the area redevelops and as Georgia Tech continues to expand research facilities in the study area.

## **Employment and Population Projections**

Population projections are derived directly from the projections for new housing units. About 2.2 people are estimated to reside in each unit, so the new population is estimated as the existing population plus 2.2 additional people per projected new housing unit.

Employment projections are derived from estimates of new retail and office space. Retail is divided into standard and restaurant/bar categories, which is then converted into employees based on industry standards of square feet per employee. The restaurant/bar category has a higher density of employees per square foot than other retail types. Office square feet is also converted into employees based on standards of square feet per employee.

## **Extrapolation and Timing Assumptions**

Residential and retail market potential are based primarily on projected population growth and demographic characteristics over the next 10 years. These potentials have been extrapolated to 25 years by using linear assumptions, i.e. that growth will continue at the same rate over the following 15 years as it does over the first 10 years.

The projections assume that both population and employment growth will be front-loaded. That is, more growth will occur in the first five years than during any other period, and the least growth will occur in years 20-25. This is consistent with the explosive development currently seen in the study area. However if actions by the city prove a catalyst for growth, additional growth may be seen in the 5-15 year time frame.



# APPENDIX H

## PROPOSED QOL ZONING

## Proposed Quality of Life Zoning Ordinances

### Permitted Use Table

P = Permitted	SUP = Permitted with Special Use Permit
P* = Permitted, up to 5% of total building area	SAP = Permitted with Special Administrative Permit
P(X) = Permitted, up to X square feet	X = Not permitted

	<b>MRC</b>	<b>MR3</b>	<b>MR4b</b>	<b>MR5b</b>	<b>LW<sup>1</sup></b>
Single-family dwellings	P	P	P	P	P
Two-family dwellings	P	P	P	P	P
Multi-family dwellings	P	P	P	P	P
Group homes <sup>2</sup>	SUP	X	X	X	SUP
Rooming houses	SUP	X	X	X	SUP
Single room occupancy residences	SUP	X	X	X	SUP
Dormitories <sup>3</sup>	SUP	X	X	X	SUP
Park-for-hire surface lots	SUP	X	X	X	X
Park-for hire decks	P	X	X	X	SUP
Automobile service stations	P	X	X	X	X
Gas stations <sup>4</sup>	P	X	X	X	X
Repair garages, paint and body shops	P	X	X	X	P
Truck stops	SUP	X	X	X	X
MARTA structures <sup>5</sup>	P	P	P	P	P
Helicopter landing facilities	SUP	X	X	X	SUP
Telecommunications switchboards <sup>6</sup>	P	X	X	X	X
Broadcasting towers lower than 70 feet in height <sup>7</sup>	SAP	X	X	X	SAP
Broadcasting towers greater than 70 feet in height	SUP	X	X	X	SUP
Bakeries and catering establishments	P	P*(2,000)	P*(2,000)	P*(4,000)	P(2,000)
Dry cleaning collection stations	P	P*(2,000)	P*(2,000)	P*(4,000)	P(2,000)
Dry cleaning facilities	P	X	X	X	X
Laundromats	P	P*(2,000)	P*(2,000)	P*(4,000)	P(2,000)
Tailoring and dressmaking	P	P*(4,000)	P*(4,000)	P*(4,000)	P(2,000)
Banks <sup>8</sup>	P	X	X	X	P

<sup>1</sup> This district will be the new live work district revised by the City, so the requirements may change based on further analysis.

<sup>2</sup> including family care homes and congregate care homes

<sup>3</sup> including fraternity and sorority houses

<sup>4</sup> but not providing regular automobile maintenance service, repair shops, or car washes

<sup>5</sup> defined as: Structures and uses required for operation of MARTA or a public utility but not including uses involving storage, train yards, warehousing, switching, or maintenance shops.

<sup>6</sup> including power generators and other telecommunications relay equipment

<sup>7</sup> and line-of-sight relay devices for telephonic, radio or television communications greater than 70 feet in height

	<b>MRC</b>	<b>MR3</b>	<b>MR4b</b>	<b>MR5b</b>	<b>LW<sup>1</sup></b>
Automatic teller machines	P	X	X	X	P
Barber shops, beauty shops, nail shops	P	P*(2,000)	P*(2,000)	P*(4,000)	P
Photocopying or blueprint shops	P	X	X	X	P
Retail establishments	P	X	X	X	P
Sales and repair establishments <sup>9</sup>	P	P*(4,000)	P*(4,000)	P*(4,000)	P
Plumbing, air conditioning service and repair	P	X	X	X	P
Grocery stores	P	X	X	X	P
Hotels	SUP	X	X	X	SUP
Mortuaries and funeral homes	P	X	X	X	X
New and used car sales	P	X	X	X	X
Nursing homes and convalescent centers	P	X	X	X	P
Restaurants, bars <sup>10</sup>	P	P*(4,000)	P*(4,000)	P*(8,000)	P
Theaters <sup>11</sup>	P	X	X	X	P
Bowling alleys	SUP	X	X	X	P
Poolrooms and amusement arcades	SUP	X	X	X	SUP
Museums, art galleries, libraries <sup>12</sup>	P	P*(8,000)	P*(8,000)	P*(8,000)	P
Bingo parlors	SUP	X	X	X	SUP
Adult businesses	X	X	X	X	X
Outdoor amusement enterprises	SUP	X	X	X	SUP
Offices, studios	P	P*(8,000)	P*(8,000)	P*(8,000)	P
Clinics <sup>13</sup>	P	X	X	X	P
Professional or service establishments <sup>14</sup>	P	X	X	X	P
Childcare centers and kindergartens	P	X	X	X	P
Clubs and lodges	P	X	X	X	P
Colleges and universities <sup>15</sup>	P	X	X	X	X
Business or commercial schools	P	X	X	X	X
Public schools	P	P	P	P	P
Private schools	P	X	X	X	P
Churches and synagogues	SUP <sup>16</sup>	X	X	X	SUP

<sup>8</sup> including savings and loan associations, and other similar institutions – but not including any drive-in service window

<sup>9</sup> for home appliances, bicycles, lawn mowers, shoes, clocks, or similar household goods.

<sup>10</sup> including coffee shops, delicatessens, and taverns

<sup>11</sup> including other commercial recreation establishments with primary activities conducted within fully enclosed buildings

<sup>12</sup> and similar profit or non-profit cultural facilities

<sup>13</sup> including veterinary (if animals are kept within soundproof buildings), laboratories, and similar uses, excluding blood donor stations

<sup>14</sup> but not hiring halls

<sup>15</sup> and other institutions of higher learning

	<b>MRC</b>	<b>MR3</b>	<b>MR4b</b>	<b>MR5b</b>	<b>LW<sup>1</sup></b>
Community centers <sup>17</sup>	SUP	X	X	X	SUP
<b>INDUSTRIAL</b>					
Light manufacturing	X	X	X	X	P
Commercial greenhouses	P	X	X	X	P
Security storage centers	P	X	X	X	P
<b>OTHER</b>					
Hospitals	SUP	X	X	X	X

### **Zoning Intensity/Requirement Table (Compare with traditional zoning)**

Here are the proposed QOL zoning charts as well as traditional zoning charts for easy comparison.

#### **Proposed Quality of Life Mixed-use Districts**

<b>QOL Zoning</b>	<b>LW</b>	<b>MRC-1</b>	<b>MRC-2</b>	<b>MRC-3-C</b>
FAR - TOTAL (bonus)	3-3.5	2.196(3.196)	4 (4.5)	7.2 (8.2)
FAR - Residential base	1.5	0.696	1.5	3.2
FAR-Nonresidential	1.5-2	1.5	2.5	4.0
Usable Open Space	LUI	LUI	LUI	LUI
Total Open Space - Residential	-	-	-	-
Public Space - Nonresidential	10% or 20% *	10% or 20% *	10% or 20% *	10% or 20% *
Height-min	24'	24'	24'	24'
Height-max	52'/225' ^	35'/52'/225' ^	52'/225' ^	225'
Transitional Height Plane	^^	^^	^^	^^
Sidewalk - min	11' loc/15' col, art #	15'	15'	15'
Supplemental Zone - min	5' local/9' col, art	none/5' col, art	none/5' col,art	none/5' col,art

#### **Note:**

^ Within 150' of residential districts/within 300' of residential districts/further than 300' of residential districts

\* Less than 0.5 acres: 10%. Greater than 0.5 acres: 20%.

\*\* Less than one acre: none. Greater than one acre: 5% of non-residential development.

# when across from a block 50% or more of single-family or two-family the average dimension applies

^^ Applies when this district adjoins R, R-G 1, R-G 2, MR-1, MR-2, RLC or PD-H districts with a height limitation less than the subject district .

loc - local streets

col - collector street

art - arterial street

<sup>16</sup> having a minimum lot area greater than 1 acre

<sup>17</sup> including community service facilities

### Traditional Commercial Districts

	<b>C1</b>	<b>C2</b>	<b>C3</b>	<b>I1</b>	<b>I2</b>
FAR - TOTAL	2.696	3.696	8.2	2.0	2.0
FAR - Residential	0.696	0.696	3.2	-	-
FAR-Nonresidential	2.0	3.0	5.0	2.0	2.0
Usable Open Space	LUI	LUI	LUI	LUI	LUI
Total Open Space - Residential	LUI	LUI	LUI	LUI	LUI
Public Space - Nonresidential	-	-	-	-	-
Height-min	-	-	-	-	-
Height-max*	*	*	225'	*	*
Setback from property line - min	10'	10'	10'	40'	40'
Sidewalk - min	-	-	-	-	-
Supplemental Zone	-	-	-	-	-

\* Transitional height plane only.

### Proposed Quality of Life Multifamily Residential Districts

		<b>MR-3</b>	<b>MR-4-B</b>	<b>MR-5-B</b>
floor area ratio*		0.696	1.49	3.20
building façade line**		16' or 24' min	16' or 24' min	16' or 24' min
sidewalk required		yes	yes	yes
side yard setback		0' or 15' min^	0' or 15' min^	0' or 15' min^
rear yard setback		15' min	20' min	15' min
min lot size		2,000 sq ft	2,000 sq ft	5,000 sq ft
street frontage length		40' min	20' min	40' min
building height^^^		80' max	52' max	35'/80'/150' #
Open Space Requirements	TOSR	none	none	none
	UOSR	LUI	LUI	LUI
	Public Space	none	none	none

\* May be calculated using net lot area or gross lot area

\*\* Required to have porches or stoops, supplemental zone and sidewalk zone. Includes side yards that are adjacent to any street. For local streets - 16' wide, for collector/arterial streets 24' wide. Distance is measured from the curb.

# 35' within 150' of residential districts/80' within 300' of residential districts/150' further than 300' of residential districts

^ Five feet of this must be landscaped.

^^ Ten feet must be landscaped

^^^ Transitional height plane applies to an MR district which adjoins an R, RG-1 and 2, MR, RLC, or PD-H district with a height limitation less than subject district.



### Traditional RG - Multifamily Residential Districts

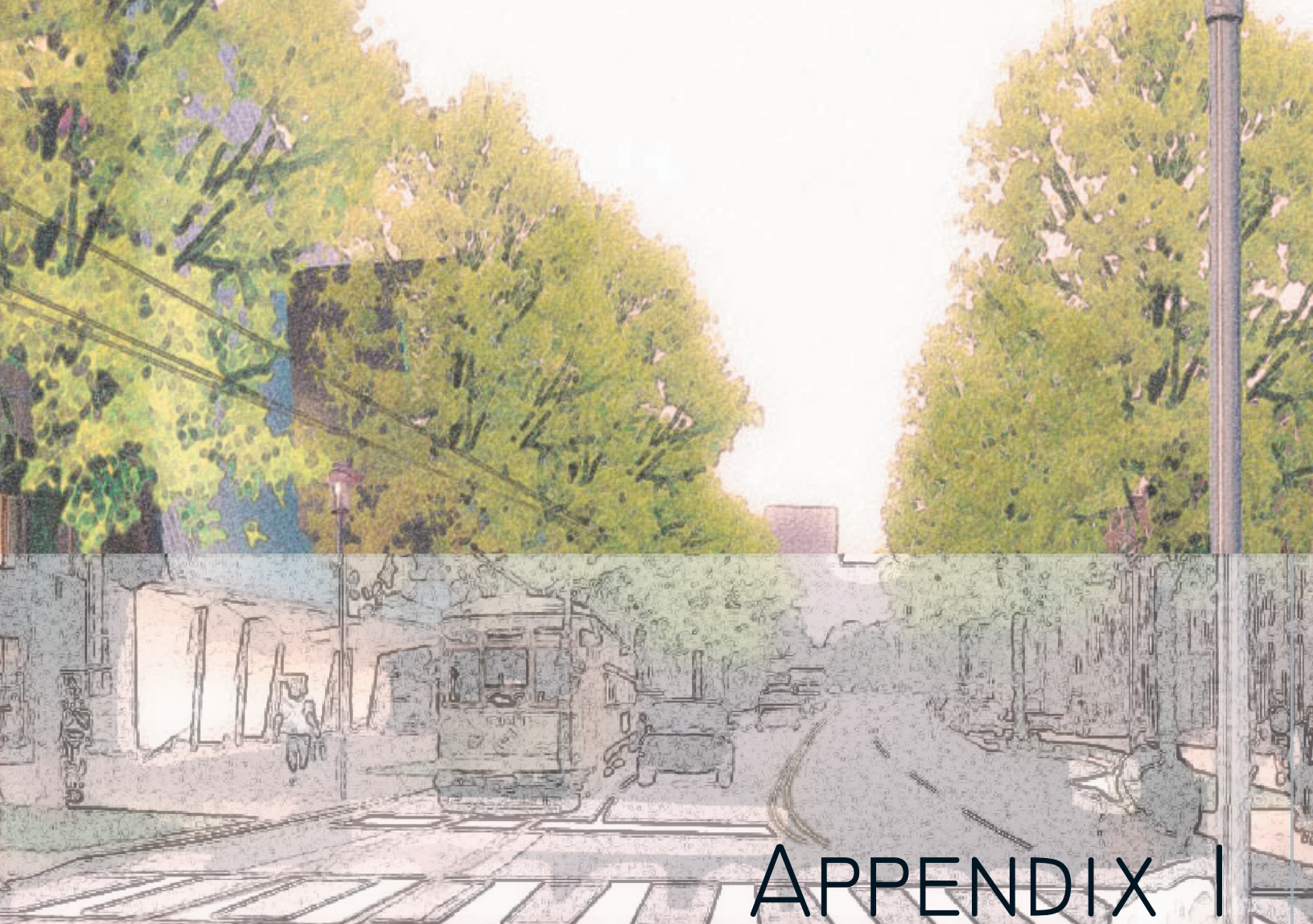
		RG-3	RG-4	RG-5
floor area ratio		0.696	1.49	3.20
building façade line**		40' min	40' min	40' min
sidewalk required		no	no	no
side yard setback		7' min	20' min	20' min
rear yard setback		7' min	20' min	20' min
min lot size		#	#	#
lot frontage length		50' min	50' min	50' min
building height^		-	-	-
Open Space Requirements	TOSR	LUI	LUI	LUI
	UOSR	LUI	LUI	LUI
	Public Space	none	none	none

\* Calculated using gross lot area.

\*\* Distance measured from lot line.

# Single-family and two-family dwelling lots - 5,000 sq ft min. All other lots - 20,000 sq ft min.

^ Transitional height plane applies to RG districts adjacent to R districts.



# APPENDIX I

## PROJECT COST METHODOLOGY

## Appendix I – Cost Estimate Methodology

### Cost Estimate Methodology

#### **Primary Streetscapes**

Primary streetscapes are streetscapes with the full range of pedestrian amenities including landscaping, lighting, street furniture, and street trees.

Primary streetscapes were estimated at a total cost of \$1,150 per linear foot. Of this total cost, 26.5% was estimated engineering cost, including contractor costs, design costs, and contingency costs.

#### **Secondary Streetscapes**

Secondary streetscapes are streetscapes with some pedestrian amenities, which vary depending upon the location specific needs. At a minimum, this includes sidewalks and curbs. This may also include some lighting or other street furniture.

Secondary streetscapes were estimated at a total cost of \$400 per linear foot. In some cases, the budget covers only one side of the street. Of this total cost, 26.5% was estimated engineering cost, including contractor costs, design costs, and contingency costs.

#### **Greenways**

Greenways are generally considered to be concrete, multi-use paths of eight to twelve feet in width, with lighting, furniture, signs, and intersection improvements. The total cost is estimated at \$375 per linear foot. Of this total cost, 26.5% was estimated engineering cost, including contractor costs, design costs, and contingency costs.

#### **Bike Routes**

Bike routes are marked with paint and street repairs and adjustments may be necessary such as repairing potholes. The total cost is estimated at \$30 per linear foot. Of this total cost, 10% was estimated engineering cost.

#### **Pedestrian Crossings**

Each pedestrian crossing consisted of one or more of the following three elements, with the cost indicated as shown:

- 1) Pedestrian crosswalk striping, estimated at \$10,000 per intersection
- 2) Pedestrian signalization, estimated at \$100,000 per intersection
- 3) Bulb outs, estimated at \$20,000 per intersection.

Each intersection was evaluated individually for the need for signalization and bulb outs. Total intersection cost was based on these improvements. Special paving materials were not budgeted for in these costs estimates.

Engineering costs were estimated at 10% of total cost.

## Open Space

For open space, costs for landscaping, planting, and park amenities were included. Cost of land acquisition was not included. Total park development costs were estimated at \$150,000 per acre for softscape parks and \$300,000 per acre for hardscape parks. Parks were deemed hardscape or softscape depending upon their location, topography, and likely intensity of use.

Engineering costs were estimated at 15% of total cost.

## Other Projects

The cost for the Main Street Trolley was estimated at \$5,000,000 per linear mile.

The cost for each public art piece was estimated at \$100,000 for public art acquisition and \$10,000 for installation.

## Detailed Cost Estimate Tables

<b>PRIMARY STREETSCAPES (both sides of street)</b>						
	<b>length (ft)</b>	<b>both sides?</b>	<b>linear feet</b>	<b>engineering cost</b>	<b>construction cost</b>	<b>total cost</b>
<b>Engineering Cost = 9% contractor + 10% contingency + 7.5% engineering</b>						
<b>Primary Streetscape - sidewalks, landscaping, lighting, street furniture, street trees</b>						
<b>Assumptions</b>				<b>26.5%</b>	<b>73.5%</b>	<b>\$1,150</b>
<i>Marietta Street/Howell Mill Road Streetscape</i>	10,560	2	10,560	\$3,218,160	\$8,925,840	\$12,144,000
<i>Northside Drive Streetscape</i>	11,766	2	11,766	\$3,585,689	\$9,945,212	\$13,530,900
<i>Donald Lee Hollowell Parkway Streetscape</i>	5,280	2	5,280	\$1,609,080	\$4,462,920	\$6,072,000
<i>14th Street Streetscape</i>	1,600	2	1,600	\$487,600	\$1,352,400	\$1,840,000
<i>Means Street Streetscape</i>	1,810	2	1,810	\$551,598	\$1,529,903	\$2,081,500

<b>SECONDARY STREETSCAPES</b>						
	<b>length (ft)</b>	<b>both sides?</b>	<b>linear feet</b>	<b>engineering cost</b>	<b>construction cost</b>	<b>total cost</b>
<b>Engineering Cost = 9% contractor + 10% contingency + 7.5% engineering</b>						
<b>Secondary Streetscape - Curbs, sidewalks, lighting.</b>						
<b>Assumptions</b>				<b>26.5%</b>	<b>73.5%</b>	<b>\$400</b>
<i>Knight Park/Howell Station Sidewalks</i>	16,292	2	16,292	\$1,726,952	\$4,789,848	\$6,516,800
<i>Brady Street Streetscape</i>	2,715	1	1,358	\$143,895	\$399,105	\$543,000
<i>West Marietta Street</i>	6,336	2	6,336	\$671,616	\$1,862,784	\$2,534,400
<i>10th Street</i>	1,810	2	1,810	\$191,860	\$532,140	\$724,000
<i>8th Street</i>	1,508	2	1,508	\$159,848	\$443,352	\$603,200
<i>Blandtown Sidewalks</i>	3,620	2	3,620	\$383,720	\$1,064,280	\$1,448,000
<i>Jefferson Street Sidewalks</i>	4,827	1	2,414	\$255,831	\$709,569	\$965,400
<i>Huff Road Streetscape</i>	5,430	2	5,430	\$575,580	\$1,596,420	\$2,172,000
<i>English Avenue North - GWCC Greenway</i>	5,430	2	5,430	\$575,580	\$1,596,420	\$2,172,000
<i>Lowery Streetscape</i>	3,318	2	3,318	\$351,708	\$975,492	\$1,327,200
<i>North Avenue Streetscape</i>	3,017	2	3,017	\$319,802	\$886,998	\$1,206,800
<i>Marietta Boulevard Streetscape</i>	9,051	2	9,051	\$959,406	\$2,660,994	\$3,620,400

<b>PED CROSSING</b>	<b>Bulb Out?</b>	<b>Signalized?</b>	<b>engineering cost</b>	<b>construction cost</b>	<b>total cost</b>
<b>Engineering Cost = 10% engineering</b>					
<b>Ped Crossing = ramps, striping, possible bulb out, signalization</b>					
<b>Assumptions</b>	<b>\$20,000</b>	<b>\$100,000</b>	<b>10.0%</b>	<b>90.0%</b>	<b>\$10,000</b>
<i>Northside Drive/ Marietta Street Crossing</i>	1	1	\$13,000	\$117,000	<b>\$130,000</b>
<i>Howell Mill Road/Marietta Street Crossing</i>	1	1	\$13,000	\$117,000	<b>\$130,000</b>
<i>Northside Drive at 10th St. Crossing</i>	1	1	\$13,000	\$117,000	<b>\$130,000</b>
<i>Northside Drive at 8th St. Crossing</i>	1	1	\$13,000	\$117,000	<b>\$130,000</b>
<i>Northside Drive at 14th St. Crossing</i>	1	1	\$13,000	\$117,000	<b>\$130,000</b>
<i>DLH &amp; Northside Drive Street Crossing</i>	1	1	\$13,000	\$117,000	<b>\$130,000</b>
<i>Marietta Street &amp; Simpson Street Crossing</i>	0	1	\$11,000	\$99,000	<b>\$110,000</b>
<i>Howell Mill Road &amp; 14th St. Street Crossing</i>	1	1	\$13,000	\$117,000	<b>\$130,000</b>
<i>Howell Mill Road &amp; 10th St. Crossing</i>	1	1	\$13,000	\$117,000	<b>\$130,000</b>
<i>Bankhead Bridge Connector</i>	0	0	\$1,000	\$9,000	<b>\$10,000</b>
<i>Lowery Boulevard/West Marietta Street Crossing</i>	1	1	\$13,000	\$117,000	<b>\$130,000</b>
<i>Blandtown Street Crossing</i>	0	1	\$11,000	\$99,000	<b>\$110,000</b>
<i>Lowery &amp; DLH Street Crossing</i>	1	1	\$13,000	\$117,000	<b>\$130,000</b>
<i>DLH &amp; English Avenue Street Crossing</i>	0	1	\$11,000	\$99,000	<b>\$110,000</b>
<i>Northside Drive &amp; North Avenue Street Crossing</i>	1	1	\$13,000	\$117,000	<b>\$130,000</b>
<i>Marietta Street &amp; North Avenue Connection</i>	1	1	\$13,000	\$117,000	<b>\$130,000</b>
<i>Northside Drive &amp; Kennedy Street Crossing</i>	0	1	\$11,000	\$99,000	<b>\$110,000</b>
<i>North Ave. &amp; Northyards Street Crossing</i>	0	0	\$1,000	\$9,000	<b>\$10,000</b>
<i>Northside Drive &amp; 16th St. Street Crossing</i>	1	1	\$13,000	\$117,000	<b>\$130,000</b>
<i>Marietta Street &amp; Brady Street Crossing</i>	1	1	\$13,000	\$117,000	<b>\$130,000</b>

OPEN SPACE	Acres	Softscape	Hardscape	engineering cost	construction cost	total cost
Engineering Cost = 15% engineering Landscaping, planting, park amenities						
Assumptions		\$150,000	\$300,000	15.0%	85.0%	
<i>Hemphill Waterworks Park</i>	20.0	1	0	450,000	2,550,000	<b>\$3,000,000</b>
<i>English Avenue North Park</i>	2.0	1	0	45,000	255,000	<b>\$300,000</b>
<i>Knight Park Improvements</i>	2.6	1	0	58,500	331,500	<b>\$390,000</b>
<i>10th St. Park</i>	1.0	0	1	45,000	255,000	<b>\$300,000</b>
<i>Huff Road Plaza</i>	2.0	0	1	90,000	510,000	<b>\$600,000</b>
<i>Huff Road &amp; Marietta Boulevard Park</i>	3.4	1	0	76,500	433,500	<b>\$510,000</b>
<i>West Home Park Plaza</i>	2.8	0	1	126,000	714,000	<b>\$840,000</b>
<i>Lowery Boulevard Park</i>	3.0	0	1	135,000	765,000	<b>\$900,000</b>
<i>West Marietta Park</i>	2.0	0	1	90,000	510,000	<b>\$600,000</b>

GREENWAYS	length (ft)			engineering cost	construction cost	total cost
Engineering Cost = 9% contractor + 10% contingency + 7.5% engineering Greenway = concrete multi-use path, lighting, signs						
Assumptions				26.5%	73.5%	<b>\$375</b>
<i>Marietta Boulevard Streetscape</i>	9,051			\$899,443	\$2,494,682	\$3,394,125
<i>Beltline Greenway</i>	15,689			\$1,559,094	\$4,324,281	\$5,883,375
<i>Marietta Boulevard Greenway</i>	9,051			\$899,443	\$2,494,682	\$3,394,125
<i>Ga. Power E-W Greenway</i>	3,017			\$299,814	\$831,561	\$1,131,375

BIKE ROUTE	length (ft)			engineering cost	construction cost	total cost
Engineering Cost = 10% engineering Bike Route = Filling potholes, signs, correcting street grates						
Assumptions				10.0%	90.0%	<b>\$30</b>
<i>Jefferson Street Bike Path</i>	1,600			\$4,800	\$43,200	\$48,000

OTHER PROJECTS				engineering cost	construction cost	total cost
Assumptions	Miles	Cost per Mile		20.0%	80.0%	total cost
<i>Main Street Trolley</i>	4.7	\$5,000,000		\$4,700,000	\$18,800,000	\$23,500,000

Assumptions	Pieces	Cost per Piece	Installation	5.0%	95.0%	total cost
<i>Public Art</i>	16	\$100,000	\$10,000			<b>\$1,760,000</b>